SERVING
CITIZENS

Strategies for Customer-Centered Government in the Digital Age

PARTNERSHIP FOR **PUBLIC SERVICE**

accenture

Collaborating to Deliver Customer-Centered Digital Services

Providing excellent services to citizens, businesses and other organizations is integral to most federal agencies' missions. However, agencies have not always put the needs of their customers first when designing and delivering services. And they have not always embraced the latest technology to ensure that their customers are receiving the best services possible.

Citizen satisfaction with government services is low and declining. According to the American Customer Satisfaction Index (ACSI), which measures customer satisfaction across sectors and industries, the federal government received an overall citizen satisfaction score of 66 in 2013, placing it below nearly every private sector industry measured.[1] The federal government now ranks below airlines and cable TV providers in customer satisfaction.

Also troubling is that government's 2013 ACSI score dropped 2 points since 2012, reversing several years of positive gains. This drop was driven largely by deterioration in satisfaction with government websites,[2] highlighting the strong impact that digital and online services can have on overall customer satisfaction. The satisfaction with websites declined broadly across government rather than being solely isolated to high-profile incidents such as the rollout of Healthcare.gov in the fall of 2013.

Rising expectations can partially explain the decline in satisfaction with government services. For better or worse, the private sector is driving citizens' expectations for digital services ever higher. Americans increasingly expect federal agencies to deliver fast and streamlined digital services like those they receive from companies such as Amazon and Google—companies which provide their customers with 24-hour access, high levels of personalization and self-service capabilities. These companies also have IT budgets far exceeding those of most government agencies.[3] Thus far, the federal government has struggled to meet these rising expectations.

The federal government also lags other public sector institutions in customer satisfaction. Satisfaction with state and local government services consistently outstrips that of the federal government, according to ACSI. In a recent international comparison, the U.S. ranked only seventh out of 10 countries surveyed in terms of overall citizen satisfaction with the quality of public services.[4] And the U.S. has recently slipped in the United Nations' E-government Development Index, dropping from the second-ranked nation in 2010 to the seventh in 2014.[5]

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1 *ACSI Federal Government Report 2013*, American Customer Satisfaction Index, Jan. 20134

2 Ibid.

3 Forest Morgeson III and Sunil Mithas, "Does E-Government Measure Up to E-Business? Comparing End User Perceptions of U.S. Federal Government and E-Business Websites," *Public Administration Review* 69, no.4 (2009), 748.

4 *Digital Government: Pathways to Delivering Public Services for the Future*, Accenture, Jan. 2014, 14.

5 *United Nations E-government Survey 2014: E-government for the Future We Want*, United Nations, 2014.

FEDERAL GOVERNMENT   LOCAL GOVERNMENT   NATIONAL (an aggregation of results for all sectors and industries measured by ACSI)

80 PERCENT

76.8

70

70.4

66.1

60

50

1994 1995 1996 1997 1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013
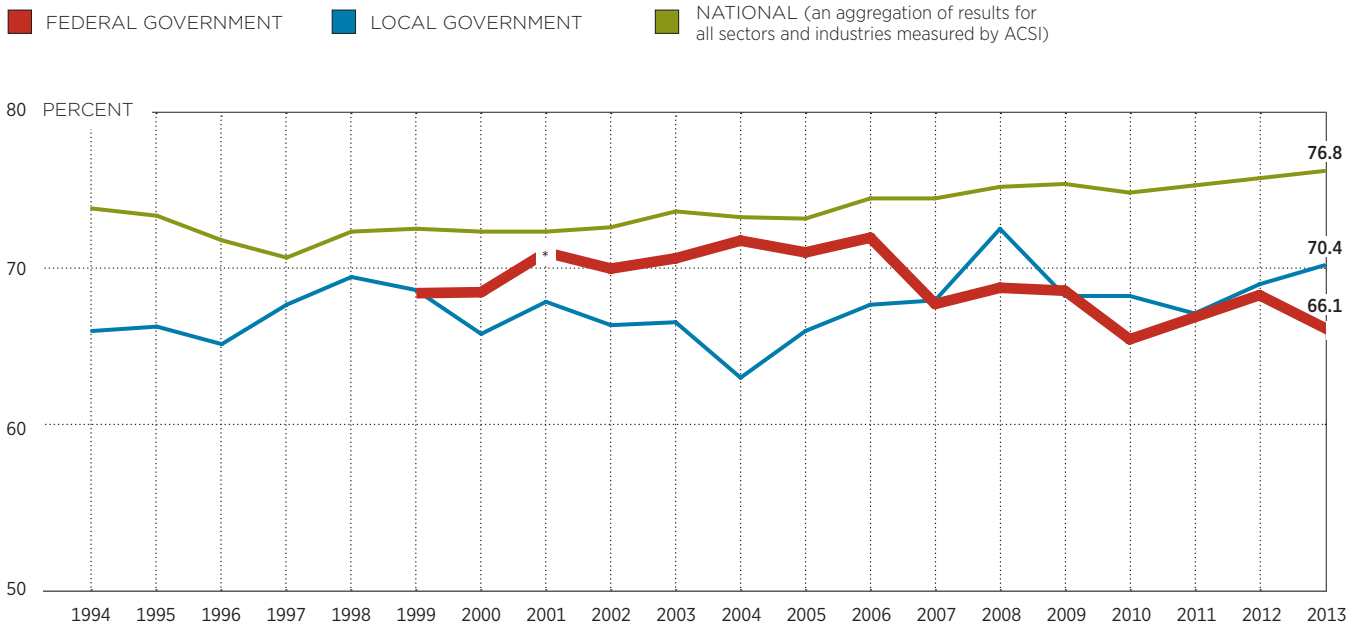
2001 Federal Government score revised Dec. 2002.

Source: *ACSI Special Report on Government* Services, American Customer Satisfaction Index, Jan. 2014.

There are many reasons why government agencies must rise to this daunting challenge of delivering exceptional services to an ever more demanding public.

Most importantly, delivering services to citizens is at the core of what many federal agencies do. From providing assistance to victims of natural disasters and helping aspiring entrepreneurs launch new businesses to facilitating access to affordable college loans, many federal agencies exist primarily to provide specific and personal services to citizens.

Satisfaction with the services government delivers is a key driver of citizens' overall trust in government—citizens reporting higher levels of satisfaction with government services are more likely to report that they trust the government.[6] Recent polls show that only 19 percent

of Americans trust the federal government, down from 73 percent when the question was first asked in 1958.[7] Trust in the federal government is much lower today than after President Nixon resigned following the Watergate scandal in 1974 (36 percent). Providing better customer service is a great way for the federal government to restore some of that trust.

Improving services to citizens also can help agencies reduce costs and manage tight budgets. Customers unable to complete poorly designed transactions on an agency's website, for example, will inevitably revert to expensive interaction channels such as call centers or office visits. Many of the federal leaders interviewed for this research reported reducing costs by streamlining digital interactions and pro-

viding customers with the tools they need to help themselves.

The need to improve services to citizens is receiving attention at the highest levels of the federal government. The White House made strengthening customer service one of its 15 cross-agency priority goals for fiscal 2015. The priority goals seek to address longstanding management and policy challenges across government agencies. To improve customer service, the administration is focusing on streamlining transactions, developing standards for high-impact services and utilizing technology to improve the customer experience, priorities which closely align with the findings and recommendations of this research.

Additionally, the Office of Management and Budget (OMB) recently launched a U.S. Digital Service to assist agencies in designing and delivering excellent digital experiences for citizens and businesses.

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6 *ACSI Federal Government Report 2013*, American Customer Satisfaction Index, Jan. 2014.

7 Pew Research, "Public Trust in Government: 1958–2013," Center for the People & the Press, http://bit.ly/1eXyFEU (accessed 24 June 2014).

Overview of a customer-centered approach to digital services

In this report, the Partnership for Public Service and Accenture highlight lessons learned from federal initiatives that have simplified and streamlined the process of interacting with the government by implementing a customer-centered approach to digital services.

Simply put, a customer-centered approach is one in which the customer's needs are the driving force behind how services are designed and delivered. This approach represents a shift in thinking—often federal services are designed and delivered based largely around the structure of government and its bureaucratic silos rather than the needs of customers who often cross agency boundaries.

For example, the federal government delivers a vast array of benefits and services to low-income families. These services are organized in a complex web and structured according to funding appropriated to specific programs, and located in individual agencies scattered across government. Employment and training opportunities, just one service that the federal government provides to low-income families, are delivered through 47 programs across nine agencies.[8] By contrast, one initiative highlighted in this report, BusinessUSA, is working to structure and deliver the myriad services that government provides to businesses around one organizing principle—the needs of business leaders.

A customer-centered approach also means that services are available 24/7 and delivered using the communications channels preferred by the customer. Government services need to be accessible to everyone, re-

gardless of their access to or capacity to use technology. However, citizens who prefer to use self-service options and complete a task online rather than call a representative or visit an office during normal business hours should have the option to do so. And the online process should be quick and intuitive, otherwise frustrated customers unable to complete their tasks will inevitably shift back to in-person or over-the-phone interactions.

Finally, a customer-centered approach seeks to mitigate the complexity of government on behalf of the customer. For example, government forms are not intuitive or easy to complete, often because complex laws and regulations dictate the structure and requirements of the forms. In fact, many private-sector services such as TurboTax which guides taxpayers in filing their federal income taxes, exist primarily to help citizens navigate complex government interactions.

A one government approach

The approaches highlighted in this report are grounded in the idea that improving services in government requires better coordination and integration across traditional organizational boundaries. Citizens interacting with government should not have to understand and navigate a complex hierarchy of departments, agencies and offices to receive benefits or services. To the greatest extent possible, they should feel like they are interacting with a connected entity rather than a maze of divided and isolated organizations.

For example, veterans should not have to navigate multiple organizations to understand which office operates which programs in order to apply for benefits, and they should not have to interact with dozens of websites or call centers to access benefit information. Business leaders should not have to start from square one every time they interact

with a different federal agency, answering the same questions and providing the same information about their businesses.

The initiatives highlighted are working to solve some of these challenges, and collaboration is essential since no one federal agency can meet these challenges alone.

While better coordinating services to customers shared across federal agencies is a great idea, it is not easy to do, especially considering the size of government and the scope of its services. Conversations with federal leaders uncovered a host of barriers that complicated the ability of agencies to integrate digital services across boundaries, including fragmented and outdated IT systems, appropriations silos, entrenched organizational cultures and security and privacy concerns.

The initiatives profiled demonstrate how many of the challenges can be met, but these case studies also show that considerable effort and skill is required. It is noteworthy that such initiatives have been rare and generally have been mandated or prompted by the White House, highlighting its important role in galvanizing efforts to coordinate services across agencies.

The case studies provide examples of cross-agency collaboration to implement a customer-centered approach to digital services. We examine the challenges each initiative addressed, the approaches taken to implement customer-centered services and the key barriers that had to be overcome.

Based on interviews with leaders of these and other initiatives in government, this report provides actionable strategies federal leaders can implement to design and deliver customer-centered digital services, and provides recommendations for reforms that can better empower agencies to provide excellent customer service to citizens.

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8 *Multiple Employment and Training Programs: Providing Information on Co-locating Services and Consolidating Administrative Structures Could Promote Efficiencies*, U.S. Government Accountability Office, January 2011.

Customer-Centered Initiatives
AT A GLANCE

The Partnership for Public Service and Accenture identified and examined promising federal initiatives that are working across organizational boundaries to implement a customer-centered approach to digital services. To identify these initiatives, we reviewed agency customer service plans, researched a variety of e-government efforts and spoke to public- and private-sector experts. We conducted structured research interviews with 46 federal and private-sector leaders across 13 agencies to learn about their initiatives, the challenges they face and their vision for the future.

Many of these initiatives involved agency leaders recognizing that their different programs were serving the same customers, such as business leaders or disaster victims, and then coming together to coordinate and streamline services. Several initiatives provide customers with a one-stop shop around a particular topic important to them, rather than requiring customers to go to multiple locations to complete related tasks owned by separate agencies.

This report profiles four of the compelling collaborations that demonstrate that a more collaborative and customer-centered government is possible. However, much work is left to be done. Many of these initiatives are works in progress and have completed only the first steps of more ambitious agendas around improving digital services.

BUSINESSUSA

Led by the Department of Commerce and the Small Business Administration, BusinessUSA operates a one-stop shop for information and services the federal government provides to businesses.

PAGE 6

THE DISASTER ASSISTANCE IMPROVEMENT PROGRAM

The Federal Emergency Management Agency leads the Disaster Assistance Improvement Program, which streamlines the processes of applying for disaster assistance by sharing customer data across federal agencies.

PAGE 10

RECREATION.GOV

A collaboration among 12 federal agencies, Recreation.gov provides a single portal for citizens to access a wealth of formerly siloed recreation opportunities that range from obtaining camping and wilderness permits to securing tickets for events at the National Archives.

PAGE 14

USA.GOV AND MYUSA

Led by the General Services Administration, USA.gov aggregates enormous amounts of information across government and helps guide citizens to what is most relevant to them.
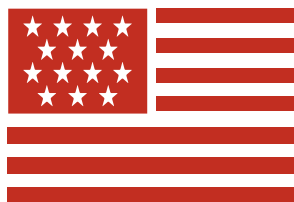
PAGE 18

BusinessUSA

INTEGRATING AND PERSONALIZING THE GOVERNMENT'S SUPPORT FOR BUSINESSES

The problem

The federal government provides an array of services to businesses, including loan programs to start and grow small businesses, assistance in exporting goods and intellectual property protection. Because interactions between the federal government and businesses are so wide-ranging and involve many different agencies and departments, connecting and coordinating those services is a daunting challenge. Additionally, businesses receiving services from one federal agency may be completely unaware of related and valuable services provided by another agency.

Leaders at the Department of Commerce began to address this issue in 2009 by launching Commerce Connect. Commerce Connect was a one-stop shop initiative to better integrate more than 60 programs for businesses across the department, many of which were operating separate citizen-facing contact points, call centers or field offices.

Commerce Connect was structured as a concierge model. Commerce experts acted as case workers for individual business leaders to assist them in identifying federal resources that could meet a full spectrum of business needs. While this model brought some success, it was very labor intensive and expensive. In response, leaders at Commerce sought to utilize technology to accomplish the same goals through a more cost-effective approach. Additionally, there were clearly opportunities to look beyond Commerce and better coordinate business services provided by other federal agencies.
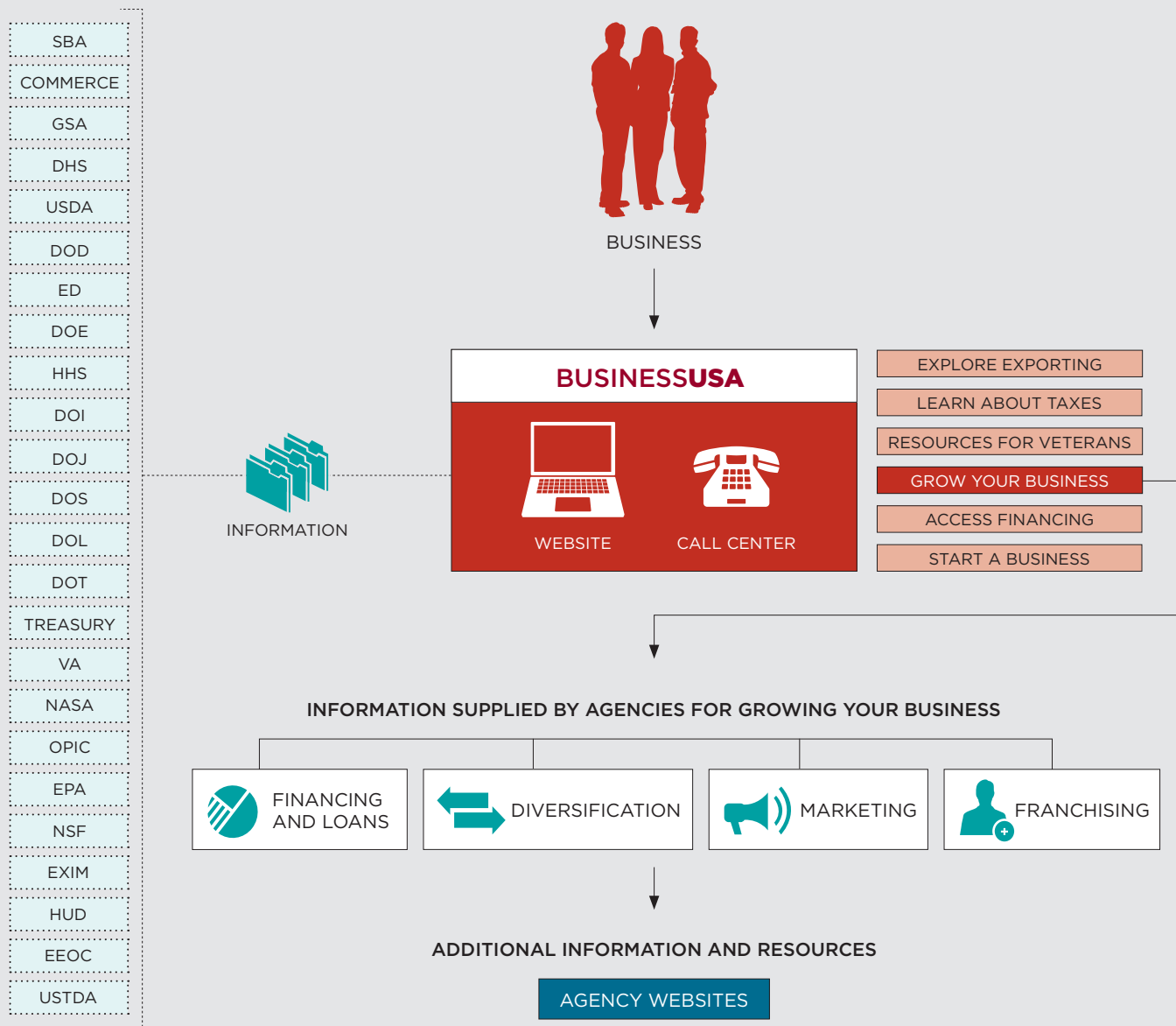
Approach and implementation

In October 2011, the White House issued an executive order directing the creation of BusinessUSA, a website envisioned as a single platform for the federal government's resources, services and information supporting businesses.

An extensive interagency effort led by the Department of Commerce and the Small Business Administration (SBA), the initiative began with the premise that businesses looking for assistance from the federal government should feel like they are interacting with one entity rather than a number of separate components. The initiative aimed to use technology to quickly connect businesses to the services and information relevant to them, regardless of which agency owned the resources. BusinessUSA also sought to deliver the high level of personalized customer service to which many business leaders were accustomed based on their experiences in the private sector.

Thoroughly understanding and delivering on the needs of their customers was central to BusinessUSA's strategy. Leaders at BusinessUSA took an iterative approach to the site's development, and ensured that continuous feedback from business leaders informed every phase of the design.

According to BusinessUSA Executive Director Dennis Alvord, an initial version of the site launched just 90 days after the issuance of the executive order and incorporated the Commerce Connect content. Leaders at BusinessUSA spent the next year conducting extensive

SBA
COMMERCE
GSA
DHS
USDA
DOD
ED
DOE
HHS
DOI
DOJ
DOS
DOL
DOT
TREASURY
VA
NASA
OPIC
EPA
NSF
EXIM
HUD
EEOC
USTDA

INFORMATION

BUSINESS

BUSINESSUSA

WEBSITE   CALL CENTER

EXPLORE EXPORTING
LEARN ABOUT TAXES
RESOURCES FOR VETERANS
GROW YOUR BUSINESS
ACCESS FINANCING
START A BUSINESS

INFORMATION SUPPLIED BY AGENCIES FOR GROWING YOUR BUSINESS

FINANCING AND LOANS   DIVERSIFICATION   MARKETING   FRANCHISING

ADDITIONAL INFORMATION AND RESOURCES

AGENCY WEBSITES

usability testing, focus groups and surveys to gather feedback on their product from the business community. Armed with this information, BusinessUSA underwent an extensive redesign to offer the services and interactions that were most desired by businesses.

During focus group sessions, BusinessUSA leaders learned that many business owners were unaware of important federal programs that could support their needs. "Some of the most common comments dur-

ing listening sessions included suggestions for specific programs and services that already existed," said Alvord. "Participants would say 'the government should have a program that does X', but a lot of the time that program already existed."

Armed with this knowledge, a resource locator tool was developed allowing users to enter their zip code and find nearby resources and events, such as a free web design event sponsored by the SBA, or a tax preparation workshop sponsored by

the Internal Revenue Service. Previously, businesses would have had to visit many different federal websites to learn about these events.

BusinessUSA also uses smart digital tools to personalize the user experience for customers and highlight the resources most relevant to their needs. "We've tried to pioneer simplicity as a way to get customers the information they are looking for," said Alvord. "We aggregate enormous amounts of information and distill it down to a very narrow set of

> "We aggregate enormous amounts of information and distill it down to a very narrow set of resources that will be most valuable to the particular customer."

DENNIS ALVORD
EXECUTIVE DIRECTOR, BUSINESSUSA

resources that will be most valuable to the particular customer."

For example, leaders recognize that while the site has thousands of resources around starting a new business, those resources will not be relevant to all users. Overwhelming the site with content could make it more difficult for customers to find the information they seek. To cut through the clutter, the site's "Start a Business" wizard collects basic information from users, such as their location and the type of business they wish to open. The automated tool then provides a specific subset of the most relevant resources, such as instructions on how to apply for specific federal and state business licenses and permits.

BusinessUSA utilizes a multi-channel approach to engage with its customers. Along with accessing the website, customers can connect through email, a call center and an FAQ engine that encourages self-service by allowing users to find an-

swers to common questions online. A shared knowledge base of questions and answers across all of these channels ensures that customers get consistent and correct answers regardless of which channel they use. Furthermore, customers with questions about their businesses do not need to know which government agency is best equipped to answer—they can just go to BusinessUSA.

Results

Since its launch in 2012, BusinessUSA has experienced consistent growth in its audience and in demand for its services. There have been almost 2 million visits to the site as of June 2014, and the number of content subscribers increased from 35,000 in 2012 to more than 90,000 in 2014, according to performance reports.

BusinessUSA has allowed its partner agencies to better serve customers and expand their audiences. For example, leaders at the Department of Labor noted that by including their resources and programs on BusinessUSA, they capitalize on the site's extensive outreach and relationship-building efforts with businesses and entrepreneurs, which they could not hope to duplicate.

The site also greatly improves the experience of businesses seeking information from the Department of Labor. Rather than labor staff referring businesses to multiple websites within the department, most of the information that businesses are looking for is available on BusinessUSA. For example, companies using the BusinessUSA site can access Department of Labor laws and regulations and information on grants for small and disadvantaged businesses.

Continuing challenges

In looking to the future, Alvord sees opportunities for BusinessUSA to better serve businesses through shared customer relationship management across agencies. BusinessUSA con-

nects business leaders to resources provided by numerous federal agencies, but it is currently limited in its ability to track customers' downstream interactions. For example, if BusinessUSA refers customers to the SBA to apply for a loan, the team currently cannot track whether they completed the application or where they are in the approval process. A shared system for tracking customers would allow BusinessUSA to ensure that visitors successfully complete transactions or receive the information they need.

Additionally, shared customer relationship management would allow BusinessUSA to provide more information about a business when making referrals to other agencies. For example, when directing a customer to the Export-Import Bank for information about export financing, BusinessUSA could share the size, location or industry of that particular business, better preparing the bank to meet that customer's needs.

> Customers with questions about their businesses do not need to know which government agency is best equipped to help—they can just go to BusinessUSA.

KEY INSIGHTS

GAIN BUY-IN

In order to gain buy-in and allay agency concerns about losing control and ownership of programs, BusinessUSA leaders emphasized that their goal was to improve programs for businesses by better connecting customer support functions, such as call centers and websites. For example, there was no reason for multiple agencies to design and maintain expensive websites targeting businesses when they could all place their resources on one site that would serve multiple needs and benefit all parties.

EMPHASIZE BUDGET NEUTRALITY

The BusinessUSA team had to grapple with hard budget realities as they built their initiative. Leaders recognized that in tight financial times, they were unlikely to receive large new investments. Instead, they made the case that by centralizing certain customer support functions through BusinessUSA, the federal government could better deploy existing resources without substantial new costs.

ENCOURAGE SHARED OWNERSHIP

To be successful, the BusinessUSA team had to maintain long-term interest and participation from agency partners. Leaders believed it was critical that BusinessUSA was a truly collaborative effort across agencies—the initiative would be harder to sustain if it was seen as one agency's pet project. Colocated staff was one strategy used to encourage shared ownership. Although many of BusinessUSA's full-time staff, including the executive director, are Commerce employees, the offices are physically located in the SBA, enshrining both agencies as key partners.

Several challenges exist to implementing this type of customer relationship management across agencies, according to Alvord. For example, separate IT systems make it difficult to share customer information across different platforms. Some agencies store customer information in an Excel spreadsheet, while others may use an electronic customer relationship management (CRM) system or maintain paper files.

Separate funding and appropriations processes also present challenges. Congress traditionally appropriates money based on programs, and agencies cannot easily combine that money to build shared systems or to better manage relationships with shared customers. BusinessUSA currently is supported by appropriated funds from both the Department of Commerce and the SBA. However, agencies that reap substantial benefits from the initiative often are limited in their ability to contribute funding to BusinessUSA because of both tight budgets and limited flexibility of funds.

BusinessUSA also hopes to implement greater levels of personalization for its visitors. For example, the team has experimented with recommending resources based on users' activities and web preferences, similar to sites like Amazon.com. Alvord reported negotiating a host of privacy and security concerns to implement these features, such as complying with requirements under the Privacy Act of 1974 (see page 27 for more information on the Privacy Act), which slow progress toward increased personalization.

The Disaster Assistance Improvement Program

SHARING CUSTOMER INFORMATION TO STREAMLINE THE DIGITAL EXPERIENCE FOR DISASTER SURVIVORS

The problem

In the wake of Hurricane Katrina in 2005, the need for better integration of federal services to disaster victims was painfully clear. Lack of coordination between programs and services located in different government agencies was identified as a major shortcoming of government's response to the disaster.[9] Survivors of the disaster needed access to benefits and resources as quickly as possible, but the application processes were fragmented and slow. Applicants for one disaster assistance program were often unaware that they also were eligible for assistance provided by another federal agency. Additionally, applicants for multiple programs had to provide the same information numerous times, creating unnecessary burdens and delays for individuals struggling with the loss of their homes, businesses and loved ones.

In response to these issues, the White House issued Executive Order 13411 in August 2006, challenging federal agencies to better coordinate disaster assistance and establish a centralized application process. Officials in the Disaster Assistance Improvement Program (DAIP), a multiagency initiative led by the Federal Emergency Management Agency (FEMA), spearheaded this effort.

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9   *The Federal Response to Hurricane Katrina: Lessons Learned, Chapter Five: Lessons Learned,* The White House, http://1.usa.gov/1AQXzRX (accessed 24 June 2014).
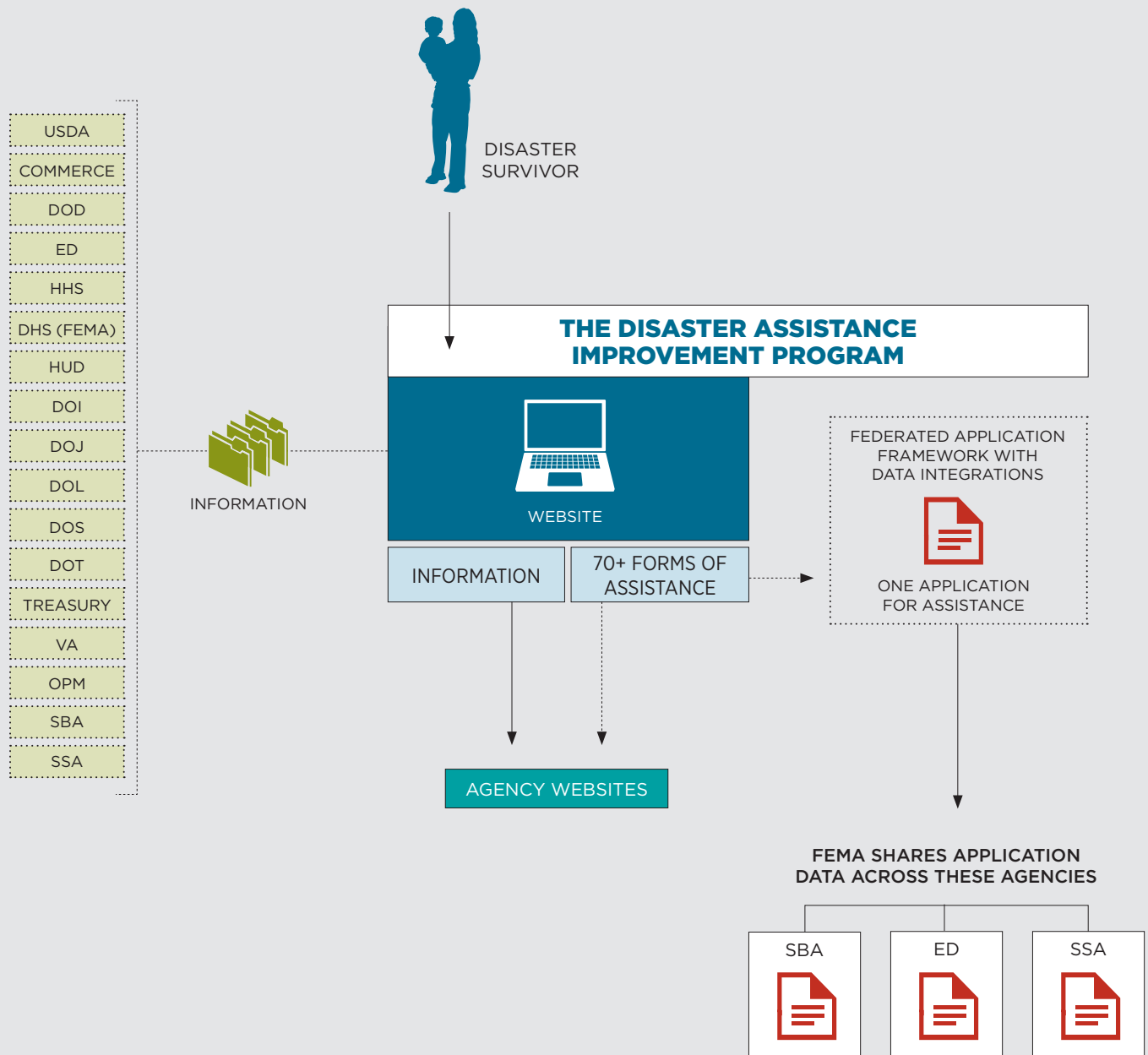
Approach and implementation

In 2008, DisasterAssistance.gov was launched, allowing users to locate information on more than 70 disaster assistance programs from 17 federal agencies, apply for assistance and check the status of their applications.

After creating an online hub of information, FEMA focused on further integrating the application processes located in separate agencies.

"The vision behind this work is effective data sharing among the federal agencies that provide disaster assistance," said Karole Johns, DAIP's program manager. "We want the disaster survivor to be able to provide all the information in a single online session and have that data distributed to all of the agencies that will potentially touch that person's case file and provide them with assistance."

To realize this vision, DAIP managers are building a federated application framework that allows FEMA to serve as a "data broker," collecting and sharing application data across multiple agencies to reduce the number of forms individuals must complete and to simplify the application process, according to Johns.

DAIP currently has data integrations in place with the Department of Education, the Social Security Administration and Small Businesses Administration (SBA). The SBA integration, for example, allows individ-

USDA
COMMERCE
DOD
ED
HHS
DHS (FEMA)
HUD
DOI
DOJ
DOL
DOS
DOT
TREASURY
VA
OPM
SBA
SSA

INFORMATION

DISASTER SURVIVOR

THE DISASTER ASSISTANCE IMPROVEMENT PROGRAM

WEBSITE

INFORMATION

70+ FORMS OF ASSISTANCE

FEDERATED APPLICATION FRAMEWORK WITH DATA INTEGRATIONS

ONE APPLICATION FOR ASSISTANCE

AGENCY WEBSITES

FEMA SHARES APPLICATION DATA ACROSS THESE AGENCIES

SBA   ED   SSA

uals who have registered for disaster assistance with FEMA to automatically prepopulate common data into the SBA's loan application system, eliminating the need for entering the same information more than once. Applicants can then check the status of applications with both FEMA and the SBA on DisasterAssitance.gov rather than visiting separate websites for each application.

In attempting to integrate as many disaster assistance programs as possible, DAIP officials recognized the need for flexibility to handle variations in IT maturity among agency partners. While integrating with technologically advanced partners who already collect application data electronically is comparatively easy, integrating with less advanced partners working with paper-based forms presents a challenge.

For partners using paper-based applications, FEMA developed the capability to host the forms electronically on DisasterAssistance.gov. FEMA delivers the completed form back to the partner agency as a PDF. According to Johns, this allows FEMA to "meet its partners where they are" while still allowing applicants to complete the form electroni-

> "The vision behind this work is effective data sharing among the federal agencies that provide disaster assistance."

KAROLE JOHNS
PROGRAM MANAGER, DAIP

cally if they wish. "We have a lot of different ways to handle integration to play to agencies' strengths and weaknesses," said Johns.

Results

DisasterAssistance.gov hosted over 4 million visitors in fiscal 2013 and registered more than 370,000 individuals for assistance, according to the program's annual report. The year brought a record-high number of site visits from millions of citizens affected by Hurricane Sandy.

Recent increases in the percentage of applicants registering for assistance on web and mobile devices also highlight the demand for the program's services. According to Johns, about 23 percent of those who apply for disaster assistance traditionally have done so online. As DisasterAssistance.gov has improved its web and mobile sites, the numbers have risen. During Hurricane Sandy, almost 60 percent of applicants registered online, demonstrating the value this site brings to those seeking disaster assistance.

According to program documents, DisasterAssistance.gov received an average satisfaction score of 79 out of 100 on the ForeSee Customer Satisfaction Survey in fiscal 2013, beating the government-wide average of approximately 75. FEMA also conducts an internal cus-

tomer satisfaction survey in which more than 95 percent of Disaster-Assistance.gov users routinely give the site ratings of satisfactory or better.

In 2013, the Web Marketing Association honored Disaster-Assistance.gov with an Outstanding Achievement in Mobile Website Award for using responsive design technology to ensure that those seeking disaster aid can access the website from their mobile devices or desktops with the same optimized viewing capability.

Continuing challenges

Dealing with outdated technology that serves as the basis for sharing information between agencies is a key challenge for the program. "Our current system is running on technology that is approaching 20 years old, and it's exorbitantly expensive to maintain or make changes," said Johns. To address this issue, Johns hopes to move this legacy system into "break and fix" mode, where changes would be made to the system only if something breaks. Johns is confident the money saved by no longer investing in updates will quickly enable construction of a new system.

Complying with the Privacy Act of 1974 complicates the process of sharing information on disaster

ESTABLISH THE RIGHT FUNDING MODEL

Originally agency partners contributed funding to DAIP through a model based on web metrics—agencies were charged based on the volume of web traffic hitting their programs or transferring to their agency websites through DisasterAssistance.gov. Partners eventually realized that this model served as a disincentive to collaboration; agencies that better integrated their resources with DisasterAssistance.gov were charged more. In June 2014, the program implemented a new model where partners are charged a flat fee, with additional charges for each form of disaster assistance that an agency has not incorporated into DisasterAssistance.gov.

BUILD IN TIME TO COMPLY WITH PRIVACY CONCERNS

Agencies seeking to share customer information to streamline the user experience must comply with the Privacy Act of 1974. (See page 27 for more information on the Privacy Act.) Leaders of the disaster assistance program noted the importance of building time for a thorough privacy review into their projects to ensure that each agency is operating within its legal boundaries regarding customer information that is collected and stored.

DEMONSTRATE VALUE TO INITIATIVE PARTNERS

Encouraging participation from agency partners whose primary missions are not to provide disaster assistance was tricky at times, according to Johns, especially in the years following Katrina when few disasters occurred. However, when a series of tornadoes hit large college towns in the Midwest, the Department of Education began to see huge value in its participation in DAIP. Current and former students affected by disasters often need assistance with their financial aid packages. For example, they may require more time to make payments or need to transfer to a different school. Because of its participation, the Department of Education was better prepared to assist these students.

Johns encourages agency partners to see their participation as an insurance policy—something they hope they will not need but may be glad they have.

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survivors across agencies. Under the Privacy Act, FEMA is allowed to maintain only limited customer information. For example, FEMA cannot maintain business and financial data that its partners in the SBA need and are authorized to collect. FEMA implements a "catch and release" strategy to share data and sensitive information in compliance with the Privacy Act. It collects and transmits certain financial data to the SBA, but does not store or maintain that data in any of its systems.

The disaster assistance program hopes to continue to streamline and personalize interactions by implementing an upfront needs assessment at the beginning of the application process. As more resources and types of assistance are added to the site, this needs assessment will be critical to help applicants quickly find the resources most relevant to them. For example, an applicant who is only claiming damages to a car would be asked only data collection questions related to this need, and the information provided would prepopulate in the appropriate forms.

Recreation.gov

SIMPLIFYING RECREATION RESERVATIONS ACROSS GOVERNMENT

The problem

The federal government protects and maintains some of the most beautiful natural resources in the world for the enjoyment of the public. Roughly a dozen agencies play critical roles in overseeing and facilitating access to federally protected natural resources, such as national parks, national forests, wilderness areas, rivers and lakes. From a citizen's perspective, gaining access to many of these resources was once a complicated process.

In the 1990s, the Department of Interior's National Park Service (NPS) and the Department of Agriculture's Forest Service each operated separate online systems to reserve campsites on federal lands. Additionally, the U.S. Army Corps of Engineers managed camping and fishing reservations for many of the lakes and waterways they oversaw. The Bureau of Land Management (BLM), in turn, offered wilderness permits to access many of the remote lands and rivers they protected. And the list goes on.

This patchwork meant that citizens had to visit a dozen websites or call centers to create a picture of all the options for camping on federally protected lands. Separate contact points were also required for obtaining wilderness permits to fish, raft or hike on protected lands. An aspiring nature-lover was less likely to get lost in the wilderness than in the bureaucratic maze required to make a recreation reservation.

Along with creating a cumbersome process for citizens, maintaining separate reservation systems unnecessarily duplicated infrastructure and maintenance costs for agencies. Additionally, certain labor-intensive processes for obtaining wilderness permits desperately needed modernization. The processes for obtaining per-mits to climb Mt. Whitney in California, for example, involved hand-mailed lottery tickets inserted into a large box, mixed with a leaf blower and then selected by hand.
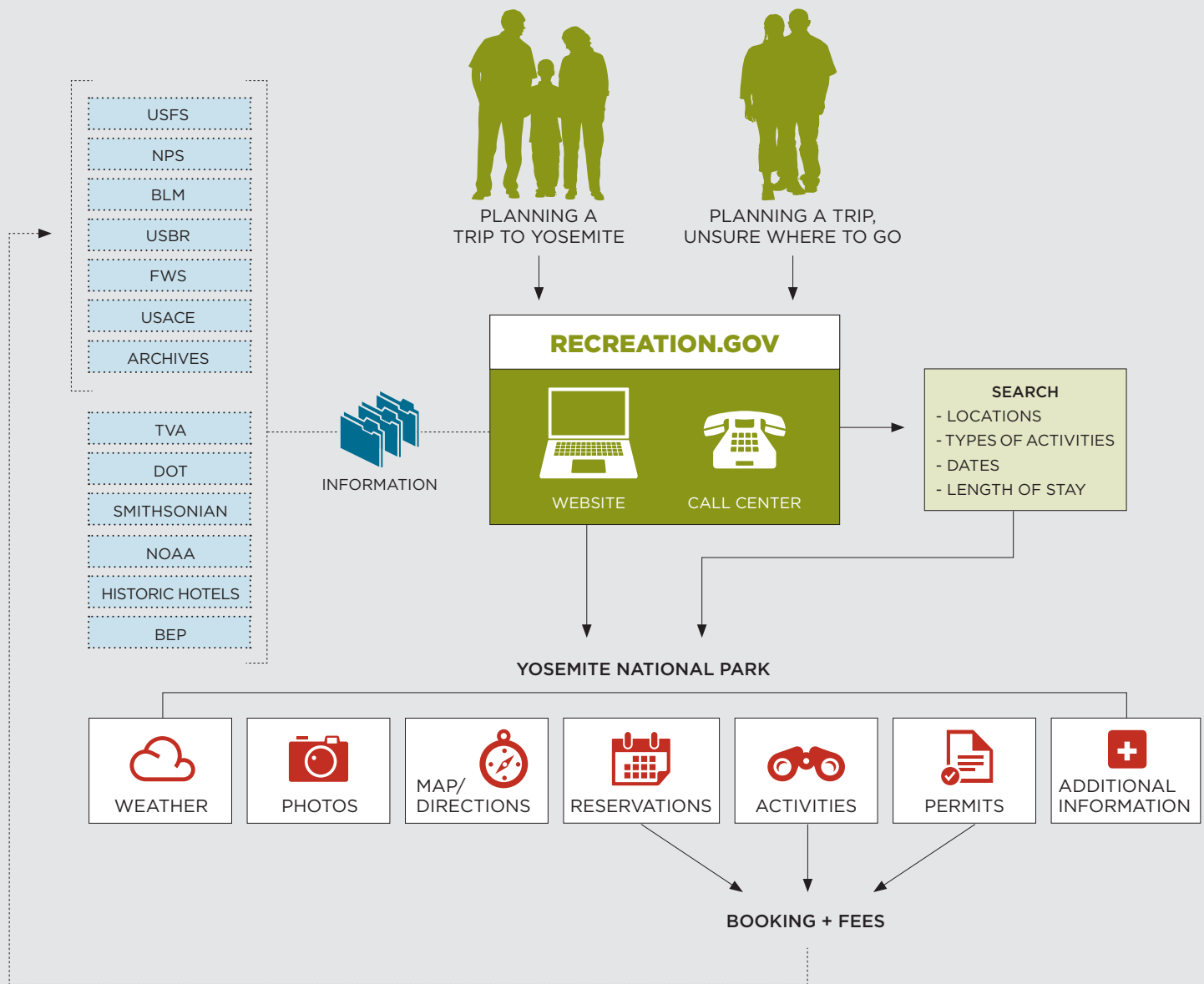
It was clear that creating a consolidated reservation system for federal land recreation opportunities could bring significant value to both government agencies and the citizens they served.

Approach and implementation

Officials at NPS, the Forest Service, BLM and the Army Corps of Engineers held discussions in the late 1990s about better coordinating existing reservations systems and simplifying the processes for citizens. In 2002 the Office of Management and Budget (OMB) accelerated these efforts by issuing a memorandum directing NPS and the Forest Service to consolidate their separate reservation systems and create a one-stop shop for federal recreation reservations.

NPS, the Forest Service and the Army Corps of Engineers launched Recreation.gov in 2007, beginning primarily as a campground reservation service that consolidated systems previously managed seperately by the agencies. The initiative quickly added more federal agency partners, growing to a total of seven today. As the partnership grew, Recreation.gov added additional resources and services. "In the last 8 to 10 years, Recreation.gov has grown to include wilderness permits, tours, maps and trip planning-services as well," said NPS Recreation One-Stop Acting Program Manager Rick Delappe.

Recreation.gov adds more services and resources every year. For example, the site is used by the National Archives and Records Administration, which has imple-

USFS
NPS
BLM
USBR
FWS
USACE
ARCHIVES

TVA
DOT
SMITHSONIAN
NOAA
HISTORIC HOTELS
BEP

INFORMATION

PLANNING A
TRIP TO YOSEMITE

PLANNING A TRIP,
UNSURE WHERE TO GO

RECREATION.GOV

WEBSITE   CALL CENTER

SEARCH
- LOCATIONS
- TYPES OF ACTIVITIES
- DATES
- LENGTH OF STAY

YOSEMITE NATIONAL PARK

WEATHER | PHOTOS | MAP/ DIRECTIONS | RESERVATIONS | ACTIVITIES | PERMITS | ADDITIONAL INFORMATION

BOOKING + FEES

mented a timed entry ticketing process for its tours that allows patrons to buy tickets for specific blocks of time rather than having to arrive and wait in long lines. Joining Recreation.gov also allowed the Archives to save money by reducing the number of on-site ticketing staff.

Ticketing for high-demand events, such as the White House Easter Egg Roll and the National Christmas Tree lighting ceremony, also has been improved through incorporation into the site. Recreation.

gov can now manage more than 70,000 applications for these events and distribute tickets through an online lottery.

To incorporate as many resources and recreation opportunities as possible, the Recreation.gov team had to build a flexible system that could accommodate the different needs of agency partners. For example, processes for receiving wilderness permits on federally protected lands vary widely. "Almost every permit process is different," said

Delappe. Some permits accept applications throughout the year, while some high-demand permits, such as those for popular climbs in Yosemite National Park, are released to the public in specific blocks of time.

According to Delappe, carefully structuring the requirements of the contract to build and manage the website was essential to ensuring the site's flexibility to deal with a variety of reservation processes. Building flexibility into the system early on was much more efficient than

> The annual number of visits to the site has doubled between 2007 and 2013.

making case-by-case adjustments as the need to incorporate new processes arose.

Recreation.gov has brought reservation processes for hundreds of recreation opportunities into the 21st century. Many reservation systems designed for specific wilderness permits quickly become outdated and experience problems with protection of private information and the security of financial transactions, said Delappe. Once these systems start to fail, integrating into Recreation.gov provides a path to adopting modern technology without having to reinvent the wheel.

Initially, Recreation.gov leaders worked hard to build trust among the many agency partners. Because OMB mandated the original consolidation of reservation systems, some agency leaders were initially wary of being compelled to use a system that did not meet their needs, said Jane Moore, a national recreation fee program manager with NPS.

Frequent and clear communication among agency partners was crucial to overcoming initial concerns around collaboration, Moore and Delappe said. However, obtaining buy-in from agency partners also depended on building a service that brought agencies clear value and benefit. The fact that Recreation.gov was well received by the public and helped save time for agency staff was crucial to generating support, said Moore.

Initial results

Recreation.gov has continued to attract and serve more visitors over time—the annual number of visits to the site has doubled between 2007 and 2013, rising from 7.2 million to 14.9 million, according to program performance documents. The site had 7.4 million new users in 2013, up from 4 million new users in 2007. The site also increased the number of transactions it processed by 18 percent between 2009 and 2013.

> To incorporate as many resources and recreation opportunities as possible, the Recreation.gov team had to build a flexible system that could accommodate the different needs of agency partners.

Customers report high levels of satisfaction with Recreation.gov; 80 percent of customers surveyed in 2013 would recommend the site to others and 85 percent would return to the site.

Recreation.gov has enhanced the security of the fee collection process for recreation reservations. The site collected about $100 million in reservation fees in 2013, a 36 percent increase from 2009, according to Delappe. While many reservation fees were formerly collected as cash payments at the reservation sites, fees now are collected electronically and can be deposited directly into the appropriate agency accounts.

INVOLVE FRONTLINE STAFF IN KEY DECISIONS

Recreation.gov leaders highlighted the importance of having employees who serve customers involved in design of the website and the reservation system. The staff most frequently interact with customers and best understand their needs. The system would likely not have been as responsive to the end-user if only senior leaders or technical experts had been involved in key decisions.

ANALYZE SOCIAL MEDIA

Recreation.gov leaders use social media as a quick, albeit unscientific strategy to get feedback from customers. Leaders noted that simply by searching reviews on travel sites like tripadvisor.com they were able to get rapid feedback about what customers were saying regarding the ease of making reservations through Recreation.gov. The team also receives more formal feedback through online customer satisfaction surveys.

TRANSLATE THE BUREAUCRATIC PROCESS FOR CITIZENS

The bureaucratic processes for receiving wilderness permits can be complex and difficult for citizens to understand. Recreation.gov leaders focused on creating automated processes that met all requirements, but were more logical and intuitive for users.

Delappe noted that this method of collecting fees is much less logistically complicated and much more secure.

Continuing challenges

Keeping up with the ever increasing pace of technological advancement has always been a challenge for the Recreation.gov team. "There's always something new around the corner," said Delappe.

Carefully structuring the contract for the site's maintenance was key to meeting this challenge. The Recreation.gov team utilizes a performance-based contract, setting the end results it wants to achieve rather than strictly defining details and technical requirements. According to Delappe, this strategy positions Recreation.gov to best utilize new technologies in the private sector, including those with which government agencies may be unfamiliar.

Adopting the newest technologies throughout the life cycle of the contracts is a challenge for Recreation.gov managers. The site's previous contract was developed in 2003, largely predating the era of smartphones. Consequently, the requirement to develop smartphone apps was not something they thought to include in the original contract. As Recreation.gov prepares for an upcoming contract renewal, officials are considering strategies to provide incentives for the contractor to adopt and incorporate new technologies as they arise.

In the future, the Recreation.gov team hopes to make more data about recreation opportunities available to the public. Recreation.gov is supported through a recreation information database, which aggregates data on recreation opportunities and is available to the public through a download. Delappe sees great potential for entrepreneurs to use this data to support new ventures and services, such as trip-planning tools or tourism promotion.

USA.gov and MyUSA

CREATING A "FRONT DOOR" FOR GOVERNMENT'S ONLINE PRESENCE

The problem

There are nearly 100 independent federal agencies and several hundred government subcomponents, each with its own web presence. During the early years of the internet, most federal agencies and subcomponents created websites independently of one another. Unfortunately, many agencies structured their online presence around their organizational hierarchy of departments, offices and bureaus, instead of around topics relevant to citizens, such as health, education or safety.

For the average citizen who may not understand how government is organized, navigating the massive federal online presence to find specific information is like searching for a needle in a haystack. In some instances, citizens may be unaware of which services are provided at the federal level as opposed to state and local levels.

By the early 1990s, it was clear that government needed to revamp its online strategy to provide more structure and clarity for citizens seeking services and information.

Approach and implementation

In the 1990s, the White House charged the Office of Citizen Services and Innovative Technologies at the General Services Administration (GSA) with enabling citizens to better navigate the government's complex web presence. To meet this goal, GSA created USA.gov to serve as a "front door" to government.

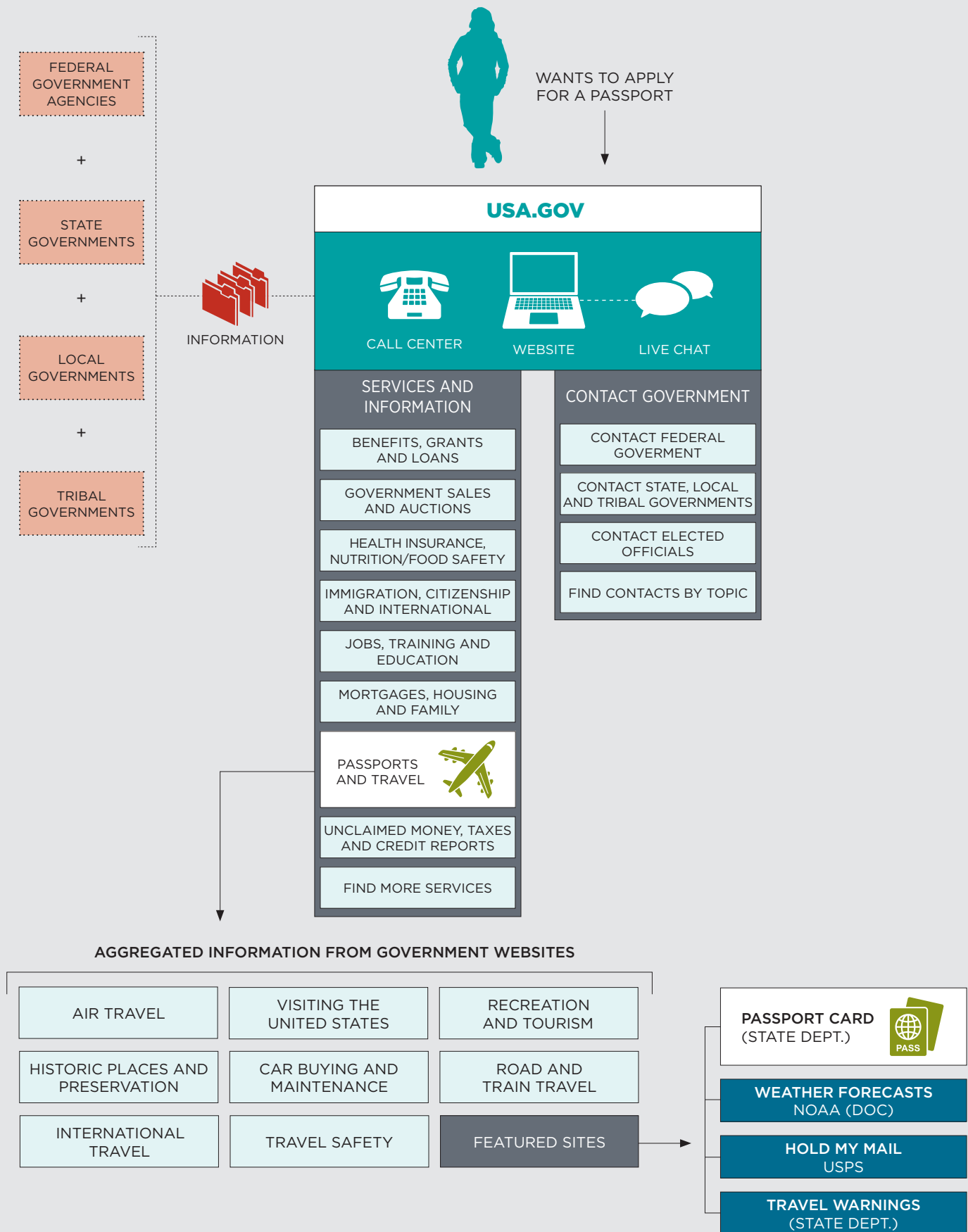"USA.gov is either the first place you go if you don't know what you're looking for or the last if you have looked for information and couldn't find it anywhere else," explained Bev Godwin, director of the Federal Citizen Information Center at GSA.

Rather than duplicate information already available on other agency websites, USA.gov aggregates and organizes this information to be more accessible and understandable for citizens.

Condensing all of the federal government's information into a manageable hierarchy of discrete topics was no easy task. To accomplish this feat, the USA.gov team solicited the assistance of librarians who helped develop the website's first organizational structure. Realizing that its first attempt would not be perfect, the team gathered customer feedback to further refine the site. The team continually collects data on the specific topics that draw the most website traffic in order to further improve USA.gov's content and organization.

As the project evolved, the USA.gov team expanded to include state, local and tribal government resources. Now citizens can consult this single website even if they are unsure which level of government has ownership over a specific task. "Our philosophy is that people don't know how government is organized and they shouldn't have to," said Godwin. For example, some citizens may not realize that renewing a driver's license must be accomplished at the state level. Searching through USA.gov will direct the individual away from federal websites and toward the relevant state-level website.

The USA.gov team continually uses customer feedback to refine its product. Information on the site was

WANTS TO APPLY
FOR A PASSPORT

FEDERAL
GOVERNMENT
AGENCIES

+

STATE
GOVERNMENTS

+

LOCAL
GOVERNMENTS

+

TRIBAL
GOVERNMENTS

INFORMATION

USA.GOV

CALL CENTER

WEBSITE

LIVE CHAT

SERVICES AND INFORMATION

BENEFITS, GRANTS
AND LOANS

GOVERNMENT SALES
AND AUCTIONS

HEALTH INSURANCE,
NUTRITION/FOOD SAFETY

IMMIGRATION, CITIZENSHIP
AND INTERNATIONAL

JOBS, TRAINING AND
EDUCATION

MORTGAGES, HOUSING
AND FAMILY

PASSPORTS
AND TRAVEL

UNCLAIMED MONEY, TAXES
AND CREDIT REPORTS

FIND MORE SERVICES

CONTACT GOVERNMENT

CONTACT FEDERAL
GOVERMENT

CONTACT STATE, LOCAL
AND TRIBAL GOVERNMENTS

CONTACT ELECTED
OFFICIALS

FIND CONTACTS BY TOPIC

AGGREGATED INFORMATION FROM GOVERNMENT WEBSITES

AIR TRAVEL

VISITING THE
UNITED STATES

RECREATION
AND TOURISM

HISTORIC PLACES AND
PRESERVATION

CAR BUYING AND
MAINTENANCE

ROAD AND
TRAIN TRAVEL

INTERNATIONAL
TRAVEL

TRAVEL SAFETY

FEATURED SITES

PASSPORT CARD
(STATE DEPT.)

PASS

WEATHER FORECASTS
NOAA (DOC)

HOLD MY MAIL
USPS

TRAVEL WARNINGS
(STATE DEPT.)

> "Our philosophy is that people don't know how government is organized and they shouldn't have to."

BEV GOODWIN
DIRECTOR, FEDERAL CITIZEN INFORMATION CENTER

originally divided into two categories: topics and services. After initial testing, however, the team realized that users found it confusing to classify their needs in this way. Rather, customers visited the site with a specific request or need, such as wanting to obtain a passport. In response to this feedback, the team eliminated the distinction between topics and services, making information more accessible.

In order to meet customer expectations, the USA.gov team utilizes a multichannel approach to delivering content. The website is complemented by a mobile application as well as by USA.gov's social media presence. For customers who prefer personal interactions to online services, USA.gov maintains a traditional call center.

The USA.gov team also has focused on meeting the needs of different customer segments served by government. The team developed GobiernoUSA.gov, a Spanish-language website analogous to USA.gov, in order to better serve Spanish-speaking citizens. Rather than simply translating USA.gov content into Spanish, this website highlights and structures content based on the most popular and relevant resources for Spanish-speaking citizens. There are links to immigration services, resources for learning English, and information on voting and the structure of the U.S. government.

The team used the same approach to develop a website for elementary and middle school children, called Kids.gov. This website similarly focuses on its audience's needs and preferences, tailoring content to the core school curriculum and presenting it in a way that better engages children. For example, there are resources on art and music, online safety, science, healthy eating and mathematics.

USA.gov rivals Twitter as one of the most linked-to sites on the internet.

Results

According to program performance documents, USA.gov served more than 66 million individuals in 2013. In addition to online visitors, USA.gov has more than 745,000 email subscribers who receive regular updates tailored to their specific areas of interest. The site also features a web chat option that allows customers to communicate with a customer service agent during business hours, a service used by 35,000 citizens in 2013.

There are approximately 9.7 million links to USA.gov on other websites, highlighting the importance of the information and resources the site contains. In fact, USA.gov rivals Twitter as one of the most linked-to sites on the internet.

USA.gov was singled out by the United Nations' E-Government Survey in 2012 as one of the best examples worldwide of a "highly integrated portal."[10] The report highlights the ease with which citizens are able to navigate USA.gov to find relevant information and answers to FAQs.

GobiernoUSA.gov, the Spanish-language counterpart to USA.gov, tied for the highest rating of department main sites in 2011 with an American Customer Satisfaction Index score of 86.[11]

A vision for the future: MyUSA

GSA is currently exploring an innovative new platform to complement USA.gov, MyUSA, which could transform how citizens interact with

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10 *E-government Survey 2012: E-government for the People,* United Nations, 2012.

11 *ACSI Benchmarks for E-Government Q4 2011,* American Customer Satisfaction Index, January 2012.

IDENTIFY THE MOST IMPORTANT CUSTOMER FEEDBACK METRICS

The USA.gov team scrutinizes the customer feedback metrics that are most relevant to its goals. For example, many websites strive to increase the amount of time users spend on the site and minimize the "bounce rate" of users that quickly leave. The goal for USA.gov, however, is to direct citizens to the appropriate government websites as quickly as possible. The team realizes that a higher bounce rate is not only permissible, but desirable.

REFINE BASED ON CUSTOMER FEEDBACK

Rather than spending years refining the USA.gov website before launch, the team quickly built a functional website and then continually refined the product based on customer feedback. This iterative development strategy ensured that the product was built with the end user in mind.

NEGOTIATE PRA

Agencies pursuing initiatives that require collecting information from customers should seek approval and clearance under PRA and consider using the generic clearance option for collecting customer feedback.

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government. Led by a digital services team within GSA, MyUSA envisions providing citizens with a customized dashboard to manage and track their interactions across government agencies. MyUSA would provide a single user account through which citizens could access and manage their tax payments, Social Security benefits, student loans and a host of other federal interactions.

Working toward this long-term goal, MyUSA is using Application Programming Interfaces (APIs)[12] to facilitate information sharing across government agencies. The team cre-

ated a "profile" API that will allow users to create basic demographic profiles and prepopulate that information into transactions across different agencies, saving customers' time. The team also built a "task" API that will create a customized checklist of forms needed to apply for benefit programs.

Additionally, GSA created a "notifications" API that can remind users to complete tasks or provide status updates at key stages in an application process, such as when a benefits application has been successfully submitted or approved.

While the MyUSA team has an intriguing vision for a more personalized and streamlined government, it faces several hurdles. According to program leaders, perhaps the most challenging is compliance with the

Paperwork Reduction Act (PRA). For example, the "profile" API requires approval under PRA because it collects information from citizens, and each federal agency looking to use or collect this information may have to go through a separate, lengthy approval process. Currently, only federal employees can sign up for a MyUSA account because PRA does not restrict agencies from collecting information from federal employees as it does for the general public.

PRA also presents challenges as the MyUSA team seeks to develop a user-friendly product, said program leaders. While the team would like to get citizen feedback as it develops the platform, it cannot ask the same question of 10 or more individuals without PRA clearance.
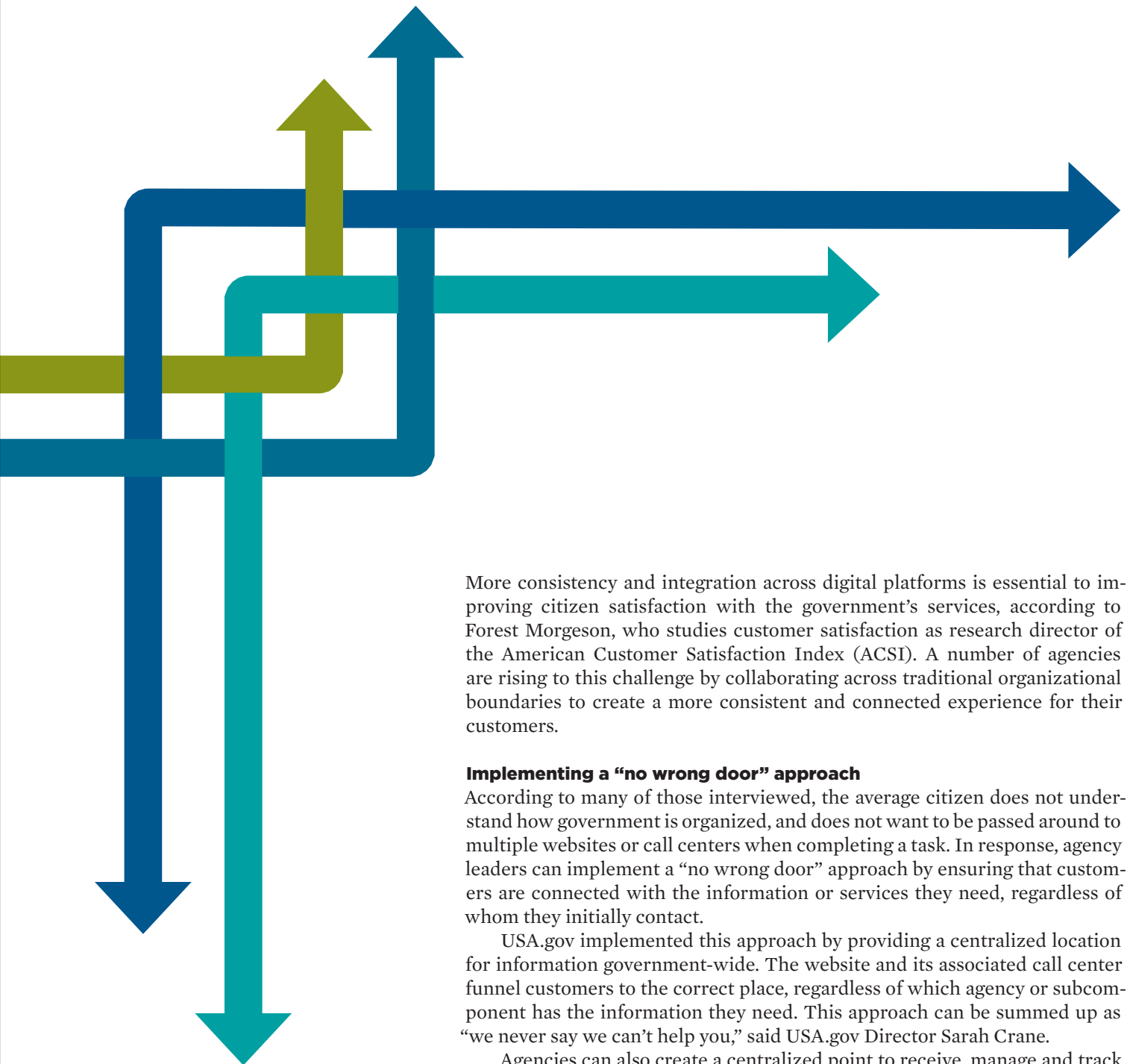
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12 An Application Programming Interface (API) is a set of rules that allows different programs to communicate with each other. Agencies can use APIs to share information and better connect separate systems.

STRATEGIES FOR DELIVERING CUSTOMER-CENTERED DIGITAL SERVICES

Create a Consistent and Connected Customer Experience

More consistency and integration across digital platforms is essential to improving citizen satisfaction with the government's services, according to Forest Morgeson, who studies customer satisfaction as research director of the American Customer Satisfaction Index (ACSI). A number of agencies are rising to this challenge by collaborating across traditional organizational boundaries to create a more consistent and connected experience for their customers.

Implementing a "no wrong door" approach

According to many of those interviewed, the average citizen does not understand how government is organized, and does not want to be passed around to multiple websites or call centers when completing a task. In response, agency leaders can implement a "no wrong door" approach by ensuring that customers are connected with the information or services they need, regardless of whom they initially contact.

USA.gov implemented this approach by providing a centralized location for information government-wide. The website and its associated call center funnel customers to the correct place, regardless of which agency or subcomponent has the information they need. This approach can be summed up as "we never say we can't help you," said USA.gov Director Sarah Crane.

Agencies can also create a centralized point to receive, manage and track

customer inquiries. For example, the Customer Service Modernization Program at the Department of Labor is piloting a shared customer relationship management (CRM) system to better coordinate customer inquiries across three of its large subcomponents: the Wage and Hour Division, the Office of Federal Contract Compliance Programs and the Occupational Safety and Health Administration. The department has intentionally selected three enforcement agencies for this pilot since they serve many of the same customers.

Standardizing the process for handling customer inquiries across these three subcomponents was challenging since each entity had separate policies and standards for interacting with customers, according to Erica Roberts, program manager for the Department of Labor's customer service initiative. Roberts noted that a strong change management strategy was key to success. The initiative utilized "integrated project teams," a management strategy that brought together staff from different agencies and functional roles to share information, balance conflicting priorities and make joint decisions.

Sharing knowledge to create a consistent customer experience

Agency leaders can create shared knowledge databases across multiple programs or organizations to operationalize a no wrong door approach and support a more consistent customer experience.

BusinessUSA implements a shared knowledge database to ensure that business leaders get consistent answers to their questions about government programs. "A common complaint is that customers get different answers through different channels," said BusinessUSA Executive Director Dennis Alvord. "For instance, the website has a different answer than a customer service representative at a call center."

To address this issue, BusinessUSA built an online FAQ engine that supports a call center, field offices and social media sites, ensuring that customers get consistent answers regardless of where they go.

Similarly, the Department of Labor created a central repository of FAQs and answers from which both employees and customers across multiple agencies can draw. Rather than relying on separate and potentially inconsistent factsheets or handbooks, this approach ensures that customer inquiries are handled consistently regardless of whether they are received at headquarters, a field office or one of the department's subcomponents.

The publicly available shared knowledge database also encourages customer self-service and helps ensure that customers get the answers they need more quickly, according to Roberts.

The Department of Labor's shared knowledge database is integrated with its CRM system, which allows the tracking of customer inquiries and uses analytics for continuous monitoring and improvement. Customers reviewing resources in the database have the opportunity to submit questions if they are unclear about the information provided. Program managers track trends around which resources appear to be unclear, and use that information to update and improve the knowledge database.

Better integrating content across communication channels

Agencies can create a more consistent and uniform digital experience for customers by adopting new innovations in web design and content management such as adaptive content. This is a strategy by which content is developed with the flexibility to be used effectively in different mediums such as print publications, websites, mobile sites and social media. The USA.gov team utilizes this strategy, which facilitates content sharing with other organizations such as state and local government agencies.

In improving how content is delivered to customers, agencies may need to consider internal realignments. The USA.gov team is reorganizing its staffing and internal operations to better support the new model of content delivery. While officials at USA.gov previously organized teams by communication channel, such as a web team, call center team and social media team, it is now restructuring around functional areas such as content development, marketing and performance management that will work across all communication channels.

Continuing challenges

Compared with the private sector, the federal government faces unique challenges fostering a consistent and connected customer experience because of the divisions that exist in government.

The nature of federal appropriations makes it particularly difficult to pool funding and integrate services across organizational boundaries. Appropriations laws that require funding to be spent on specific, narrowly defined activities present barriers to creating, for example, a cross-agency knowledge database or CRM system.

Federal leaders have employed a variety of strategies to meet this challenge. Several utilized their departments' working capital fund to establish pilot programs to better integrate services. Working capital funds typically support broad operational activities across multiple agencies or subcomponents within a department. Leaders noted that plans to use these funds should be carefully reviewed by legal counsel to ensure proper use.

Initiatives to integrate services across different federal departments, such as the Disaster Assistance Improvement Program, often require participating agencies to contribute funding. For most of the initiatives examined, participation in the program or financial contri-

butions were required by an executive order or directive from the Office of Management and Budget.

Regardless of whether participation is mandatory or voluntary, agency leaders stressed the importance of clearly communicating the value of participation to partners and focusing on how the initiative can help partners meet their goals. For example, BusinessUSA was able to receive important financial contributions from the Department of Health and Human Services because of its ability to inform businesses how they would be affected by the Affordable Care Act.

Share Customer Information to Streamline Processes and Create an Integrated View of the Customer
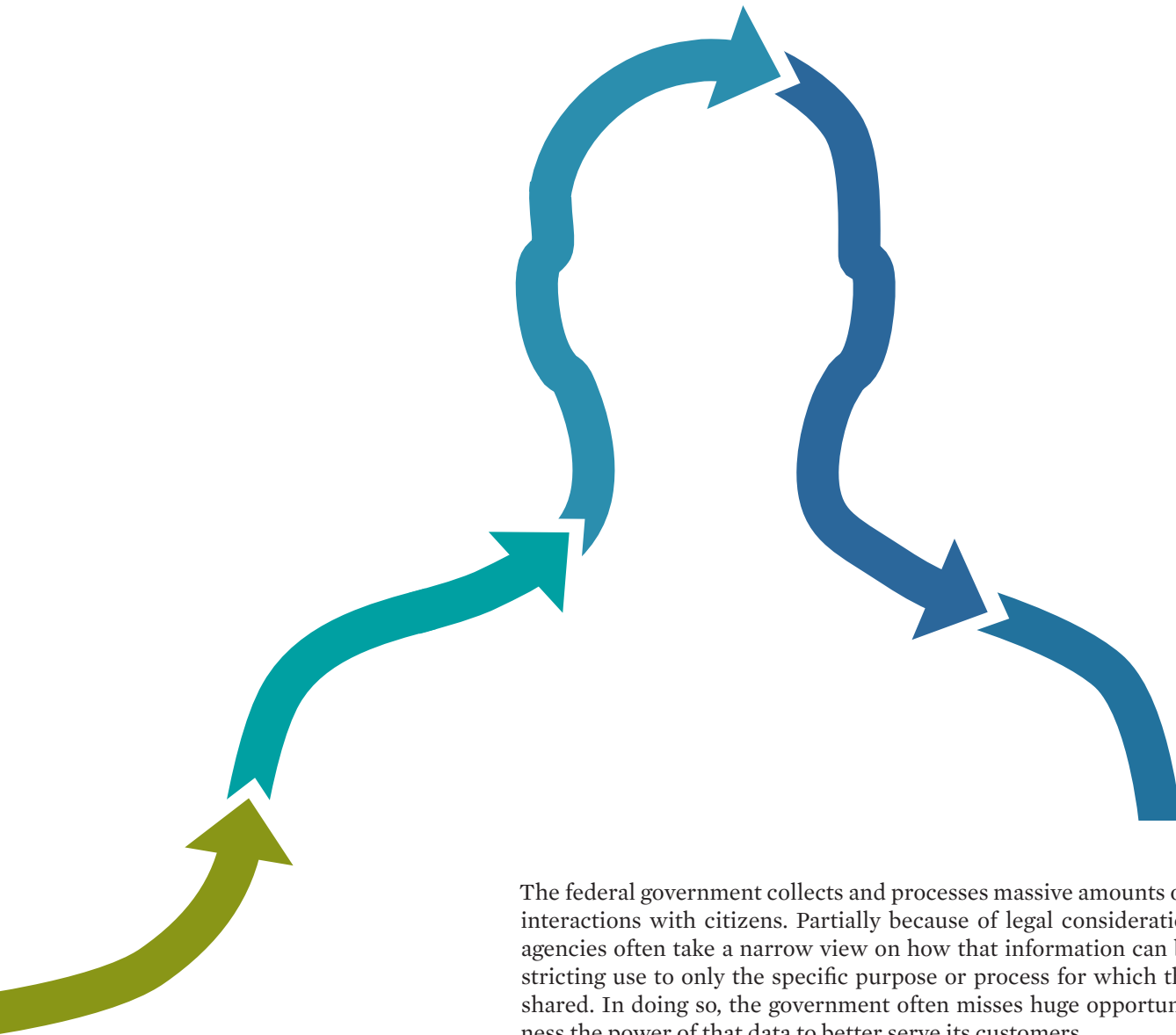
The federal government collects and processes massive amounts of data in its interactions with citizens. Partially because of legal considerations, federal agencies often take a narrow view on how that information can be used—restricting use to only the specific purpose or process for which the data was shared. In doing so, the government often misses huge opportunities to harness the power of that data to better serve its customers.

Federal agencies must be aware of legitimate concerns about security and privacy of personal information. However, many of the leaders interviewed demonstrated that when done properly, creating structured and secure systems to share customer information across organizational boundaries can be a powerful tool for improving services.

For example, several federal initiatives are allowing customers to pre-populate information that they have already shared with one agency into application processes with other agencies, greatly reducing the time required to

apply for a new service or benefit. Other initiatives are sharing customer information across boundaries to ensure that customers have quick and easy access to status updates. Several agencies are implementing shared customer relationship management (CRM) systems to create an integrated view of their customers, and ensure that staff have the background information needed to provide excellent service.

Sharing information to speed customer transactions

Sharing customer information can help federal agencies streamline transactions for citizens and reduce redundant data entry. For example, an information sharing partnership between the Office of Federal Student Aid (FSA) at the Department of Education and the Internal Revenue Service (IRS) greatly reduced the time required to complete the Free Application for Federal Student Aid (FAFSA).

Encouraging students to complete the student aid application is a huge priority for the Department of Education, according to Brenda Wensil, FSA's chief customer experience officer, because FAFSA completion is a key indicator of whether a student will eventually enroll in college. However, completing the application has not always been simple. It typically took more than an hour to finish the task.

Through several efforts, including a partnership with the IRS that allows parents of prospective students to automatically import their tax data into FAFSA, the average application completion time dropped to about 20 minutes. This partnership also greatly improved the accuracy of the information on FAFSA, since the transferred tax data has already been validated by IRS.

The student aid office also currently partners with nine states to transfer the federal application data directly into processes for applying for state financial aid, further streamlining their customers' experience.

Similarly, the Federal Emergency Management Agency (FEMA) is simplifying the experience of applying for disaster assistance by sharing application information across federal agencies that deliver aid. Rather than requiring applicants to submit duplicative information to multiple agencies, FEMA collects application information in one centralized location, DisasterAssistance.gov, and distributes it to many agency partners. DisasterAssistance.gov also provides one location where individuals can check the status of applications for multiple disaster assistance programs.

Initiatives that collect and share customer information across multiple agencies must be prepared to meet the requirements of the Privacy Act, and to handle variations in IT maturity among their partners (see the Disaster Assistance Improvement Program profile on page 10 for more information).

Creating an integrated view of the customer

Federal agencies can store, share and organize customer information to create an integrated view of the citizens they serve. Many leaders are implementing CRM systems to create a single dashboard summarizing the range of interactions a customer has had across their agencies. This strategy helps agencies ensure that staff across the organization have the essential background information needed to provide excellent customer service.

Typically, a CRM system is a database that houses customer demographic and transactional information across an organization, providing an integrated view of its customers' behaviors and preferences.

For example, the Veterans Benefits Administration (VBA) within the Department of Veterans Affairs is implementing a shared CRM system to better coordinate its many services. The array of services VBA offers, from educational benefits to disability claims and home loans, have traditionally been delivered in programmatic silos. An agent assisting a veteran with one benefit claim may not have had any access to or knowledge of other claims pending with VBA.

By implementing a shared CRM system across multiple national call centers, VBA ensures that agents have the appropriate background information about each veteran to provide effective customer service.

Similarly, the U.S. Citizenship and Immigration Service (USCIS) recently implemented a CRM system to improve services to individuals interacting with the U.S. immigration system. This CRM system provides a consolidated view of each of their customers, including demographic information, history of contact and where he or she is in the immigration process. This information not only is available to customer service agents, but customers can also see it when they log into their MyUSCIS portal, increasing transparency and allowing for more effective self-service.

Continuing challenges

Federal agencies must meet data security and privacy of personal information standards when building systems that collect, store and share customer information. The Privacy Act of 1974 established many of the legal requirements for how agencies collect and manage personal information. Under its provisions, federal agencies cannot publicly disclose any record linked to identifiable information without the written consent of the individual to whom the record pertains. Additionally, agencies can only collect and retain information that is both "relevant" and "necessary" to their missions.

Although all agencies must adhere to the basic privacy protection tenets set by the act, each individual agency maintains its own specific privacy procedures in accordance with Office of Management and Budget

(OMB) guidelines. Each agency must publish detailed plans documenting how it will collect, store, use and share personal information. Because the kinds of customer information that agencies may collect under the Privacy Act varies, sharing customer information across agencies can be complex.

For example, in streamlining applications for disaster assistance, FEMA collects and distributes information it receives from businesses only with trusted partners, entities with which it has formal Interconnection Security Agreements (ISAs). ISAs document the security measures in place to facilitate information exchange between the partners, appropriate points of contact and technical specifications of the interconnection.

Additionally, individuals who register for assistance with FEMA on DisasterAssistance.gov consent to disclosure agreements that describe how their information will be stored and shared with trusted partners.

The formal review processes through which systems collecting personal information must be approved can take several months. Leaders at FEMA as well as others interviewed emphasized the importance of building the time needed for a thorough privacy review into any projects that will be collecting customer information.

Several leaders cited challenges around building relationships across agencies and identifying the right contacts to authorize agreements for sharing customer data. The data-sharing efforts examined were supported by formal agreements and memoranda of understanding. Identifying who owns a customer data set within an agency is not always easy and may require considerable research. "Having the right people at the table is probably the biggest challenge, and if you don't have them, nothing else matters," said Karole Johns of FEMA.

Personalize Services so Customers Can Quickly Complete Transactions and Find Relevant Resources

Based on their interactions with the private sector, customers increasingly expect digital services to be personalized and tailored to their specific needs and preferences. However, the vast array of resources that most agencies provide and the complex laws and regulations governing how programs are delivered can be overwhelming for even the most knowledgeable citizens. For example, out of the many benefit programs an agency offers, how do citizens know which applies to their needs and eligibility status? Out of a list of dozens of forms on an agency's website, how do citizens know which they should complete and which are unrelated to their tasks?

Federal agencies can employ a variety of customization strategies to improve digital services and help citizens cut through the clutter inevitable in a large bureaucracy. Leaders can implement digital "wizards" or screening tools that guide citizens through complex interactions and filter resources based on their needs. Leaders also can develop tools to proactively recommend the benefits or services most likely to meet a citizen's specific needs. Additionally, leaders can provide more self-service options and allow citizens to create customized user profiles to track their interactions with agencies.

Customization is is a powerful tool to help agencies improve customer satisfaction, but it must be exercised with caution. Even in the private sector, personalizing services can be seen as invasive. Most online shoppers are familiar with the experience of suddenly being bombarded with advertise-

ments related to a recent email or web search. And many citizens are wary of the federal government overstepping their personal boundaries. However, citizens may increasingly demand more personalized services when those efforts result in streamlined transactions and better connections to relevant resources. Some federal leaders are using the strategies below to customize services while still respecting the personal boundaries of citizens.

Using screening tools to simplify complex processes

The process of applying for and receiving benefits or services from government can be complex and overwhelming. Due to the legislative and regulatory complexity that underpins many government services, application forms and processes are rarely user-friendly and often full of government jargon. This challenge frustrates citizens interacting with government and devours staff time and resources in agencies seeking to guide customers through complex processes. To address this challenge, leaders can build automated tools to simplify and customize services.

For example, the Export-Import Bank is implementing a Smart Forms initiative to assist its customers, which are primarily companies seeking export financing, in selecting and completing loan application forms. The bank has traditionally struggled with customers submitting incorrect or incomplete forms for the thousands of loan applications it processes each year. Frustrated customers must revise and resubmit incorrect submissions, slowing processing times and diverting staff from other activities.

The bank's planned Smart Forms initiative is designed to walk customers through a series of online qualifying questions that use plain language to help applicants determine which forms to complete. The automated system coaches customers, displaying help options and flagging areas that are incomplete or appear incorrect. The Smart Forms also include a feature that shuts down irrelevant sections of the form or opens new questions based on information customers have already provided.

Similarly, the U.S. Citizenship and Immigration Service (USCIS) struggles to help customers navigate an extremely complex web of immigration services. Customers often are unsure which immigration services or benefits apply to them, and they often submit incorrect or incomplete forms that require significant remediation and follow-up by USCIS staff.

To address this issue, USCIS implemented an "Explore My Options" section of their MyUSCIS personalized web portal that collects demographic information from prospective applicants and asks them questions in plain language about their goals, such as whether they are interested in working in the U.S. or reuniting with a family member. The site then generates a list of relevant benefits and provides resources on how to apply for them. Applicants also can use a benefits wizard that collects ad-

ditional information and automatically assembles a package of forms they will need to apply. According to leaders at USCIS, this process automates some of the most basic services that would otherwise be provided by an immigration officer.

Federal leaders reported that building the decision or logic tree that underpins these automated tools was the hardest part of the process. In building the automated tool on the MyUSCIS site, staff had to dissect complex eligibility requirements from the Immigration and Nationality Act to help guide customers to the programs for which they might be eligible. "There are literally thousands of combinations that could lead to benefit eligibility," reported one USCIS leader.

Leaders emphasized that being able to see things from their customers' perspective was critical when building these automated tools. Leaders at the Export-Import Bank reported that initial processes supporting their Smart Forms initiative seemed logical to bank staff who know their processes well, but ended up confusing customers. "We had to turn the system on its head and in the end got something that was better for the customer," shared one leader.

Making proactive recommendations

Agencies also can personalize digital interactions by making proactive, tailored recommendations about services that may be of interest to a citizen. Businesses such as Amazon and Netflix have popularized this approach in the private sector, making recommendations for books to buy or movies and television programs to watch based on previous selections. While agencies are traditionally more passive about the services they provide—assuming that citizens will come to them—personalized recommendations can help agencies increase the reach of their services and connect customers with valuable resources of which they were unaware.

BusinessUSA has pioneered proactive recommendations to better connect customers with relevant resources across multiple agencies. The website, for example, provides business leaders with a wizard that helps them identify financing opportunities related to their specific needs. If a customer demonstrates interest in a U.S. Department of Agriculture loan program, the site will recommend other relevant loan programs available through the Export-Import Bank or the Small Business Administration.

While proactively recommending services can help some agencies improve customer satisfaction and expand the reach of their programs, it is not an appropriate strategy for everyone. While such recommendations may work for business leaders interested in financing opportunities, this approach may not work for citizens interacting with the government regarding sensitive topics such as health

and safety. Agencies must carefully consider their own customers' interest in tailored and personalized services, and whether they would prefer to keep their interactions with the government at more of an arm's length.

Facilitating self-service

Personalizing services means empowering customers to interact with government when and how they want to, including providing self-service options that allow customers to complete tasks themselves if they prefer.

For example, MyUSCIS provides customers of immigration services with a personalized web portal where they can log in to complete a wide variety of tasks, such as checking the status of their applications, submitting documents, sending secure messages or scheduling an appointment. USCIS leaders note that when customers utilize these self-service options, the agency saves money by avoiding more expensive person-to-person interactions.

Similarly, self-service options have allowed the Veterans Benefits Administration (VBA) to significantly speed up completion times for certain basic tasks. By providing an automated self-service option for veterans to add a dependent to their record, VBA transformed what was often a monthlong process into something a veteran could accomplish in a single day.

While self-service can be a valuable tool, agency leaders stressed that universal access to services is essential. In-person and phone services still need to be available for citizens looking to complete complex tasks, or for those without access to or comfort with technology.

Regularly Collect Customer Feedback to Improve Services
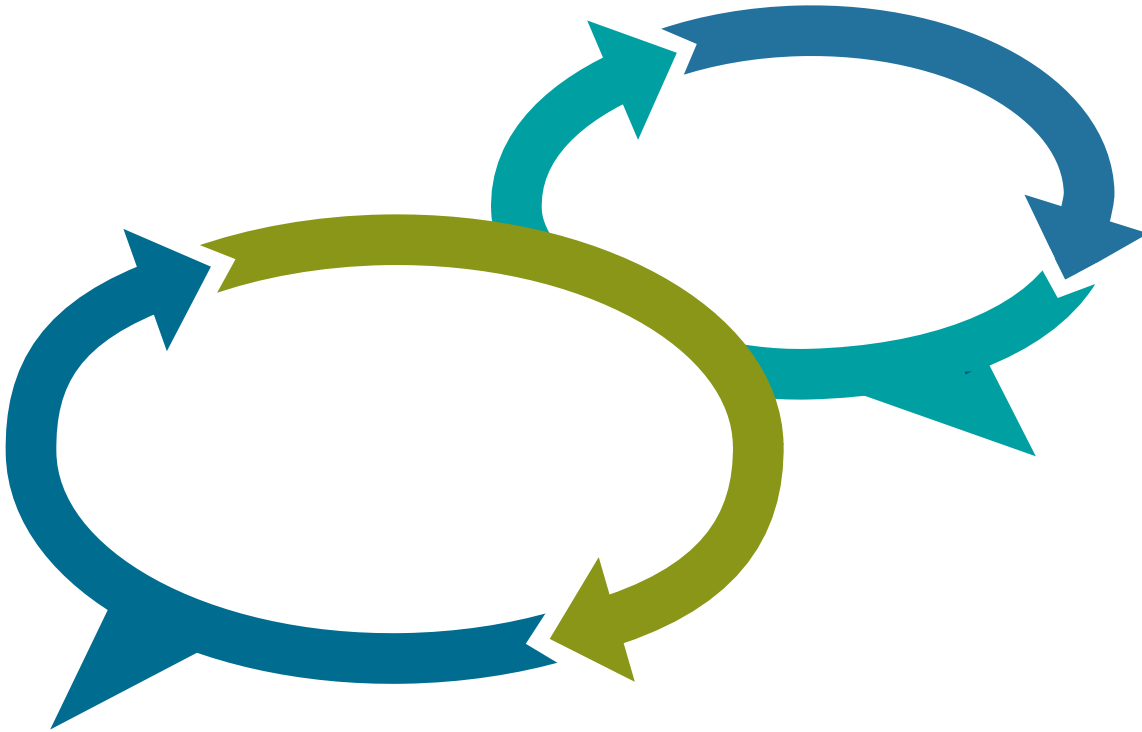
Collecting and using feedback is essential to improving customer service and implementing the strategies outlined in this report. All of the leaders interviewed used customer feedback to drive service improvements. The most common methods included focus groups, online customer satisfaction surveys and usability testing for websites and other products.

The first step is clearly identifying your customers. While this point may seem obvious, several leaders lamented that federal agencies often err in identifying only their most straightforward customers while failing to consider other customer segments. For example, agencies may identify direct service recipients as customers, but neglect to consider Congress, the Office of Management and Budget (OMB) or other federal agencies as customers from whom they also need feedback.

Agencies should carefully consider the issues that are most important to improving their services and ensure that customer feedback mechanisms reflect those metrics. The Export-Import Bank focuses on customer effort as a universal customer service metric, since one of their goals is to facilitate access to export financing for businesses while minimizing the transactional burden they place on customers. Leaders at the bank noted that measuring certain common metrics like customer loyalty would be inappropriate; Their goal is to fill a gap in the market until a business can access private financing.

Some federal leaders focus on measuring excellence in customer service rather than customer satisfaction, noting that the private sector mantra of "the customer is always right" does not always apply in government. Leaders at the Department of Labor pointed out that a business that is assessed a monetary penalty for violating a law is unlikely to be highly satisfied with that experience. Instead of measuring customer satisfaction, they examine internal metrics such as accuracy and timeliness of their customer interactions.

Collecting customer feedback is useless if it does not inform decision-making. All of the leaders interviewed cited specific examples of using feedback to tweak or redesign their services and customer interactions. The leaders also noted the importance of communicating customer feedback to senior agency leadership. Several agencies have established senior-level positions such as a Chief Customer Experience Officer to ensure that the voice of their customers is being clearly articulated to senior leaders.

Continuing challenge: the Paperwork Reduction Act

Most leaders interviewed cited compliance with the Paperwork Reduction Act (PRA) as the primary obstacle to collecting customer feedback. PRA requires agencies to complete an approval process, which often takes six to nine months including internal agency reviews, before collecting information from 10 or more members of the public. Approvals are granted for up to three years. The process includes publishing a description of the information that will be collected in the Federal Register for public comment and receiving clearance from OMB.

While the one of the primary goals of PRA is to reduce the burden of government on citizens, it has created disincentives for agencies seeking to collect customer feedback to improve their services. For example, some leaders may hesitate to implement new customer feedback surveys given the time it takes to receive approval.

To address this issue, OMB recently worked with agencies to streamline PRA approval process for voluntary customer feedback.[13] Rather than requiring agencies to complete the full process for each customer survey, OMB offers a generic clearance through which agencies can receive approval for a broad plan to collect customer feedback. OMB provides a fast-track review of individual customer surveys that fall under the generic clearance in just five business days or less. This streamlined clearance is especially helpful for agencies seeking customer feedback on digital systems that are constantly shifting and evolving as they are built.

The fast-track review has restrictions, however, that limit its use for some customer feedback efforts. For example, the streamlined process cannot be used when the results of customer surveys are intended to be published, or will be used to make significant policy or resource allocation decisions.

Agency leaders looking to implement customer feedback surveys should fully understand and consider this generic clearance process, and should consult with their internal PRA personnel to best structure and develop a PRA approval package to optimize the review process. Several leaders also recommended building relationships with OMB personnel responsible for providing PRA clearance.

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13 *OMB Memorandum M-11-26: New Fast-Track Process for Collecting Service Delivery Feedback Under the Paperwork Reduction Act*, Office of Management and Budget, June 2011.

CONCLUSIONS AND RECOMMENDATIONS

Several federal agencies are implementing promising efforts to deliver customer-centered digital services as demonstrated by the initiatives highlighted in this report, and the White House has made strengthening customer service a cross-agency priority goal for fiscal 2015, with specific benchmarks to streamline transactions, develop standards for high-impact services and better utilize technology.

Additionally, the Government Customer Service Improvement Act introduced in both the House and the Senate in 2013 would require agencies to collect customer feedback and develop customer service standards, two key elements for improving user experience.

However, even the most advanced and compelling initiatives identified are works in progress, highlighting that much is left to be done in building a more collaborative and customer-centered government.

For example, BusinessUSA has done a remarkable job gathering all of the government's information and resources for businesses in one place. But, the initiative can improve upon its ability to allow businesses to complete basic transactions with agencies; businesses are still routed into separate and disconnected systems across many government agencies to complete transactions, such as applying for loans or permits.

Similarly, while the Federal Emergency Management Agency has made considerable strides to better integrate the disaster assistance application process since Hurricane Katrina, the government can still strive to incorporate additional disaster assistance programs that are not yet included in this effort.

Other agencies that have done promising work to improve their customers' experiences still have opportunities to improve. For instance, the new system for processing immigration forms created by U. S. Citizenship and Immigration Services can be strengthened to ensure that electronic processing of forms is faster and more efficient than previous paper-based processes.[14]

The following recommendations can help guide agencies toward more customer-centered service delivery and help remove some of the hurdles agencies currently face.

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14 *U.S. Citizenship and Immigration Services Information Technology Management Progress and Challenges,* U.S. Department of Homeland Security, Office of the Inspector General, 2014 (Washington, D.C.), 17.

AGENCIES SHOULD:

Coordinate and integrate services across organizational boundaries to improve customer service.
Our review of federal agency customer service plans found that agencies primarily focus on strengthening customer service by improving interactions within their own organizational silos. Recognizing that citizen needs often cross agency boundaries, federal agencies can greatly improve services by better collaborating to serve shared customers.

Assign key leadership positions responsible for monitoring and improving customer satisfaction.
Several federal agencies have already established senior leadership positions responsible for understanding the experience of their customers and communicating customer perspectives to senior leadership. This strategy helps ensure that agencies are in tune with the citizens they serve.

Use cutting-edge technologies to establish the foundation needed for improved customer engagement and experience.
Constantly improving technology is allowing agencies to implement new customer-centered solutions to effectively manage processes, people, interactions and content, and meet ever higher customer expectations. Federal agencies should embrace this shift and adopt technologies that tie together the foundational elements at the core of their mission to provide excellent services.

Build systems and services incrementally based on customer feedback.
Federal agencies too often have fallen into the trap of spending several years and millions of dollars developing complex systems that are not responsive to the needs of their customers. An incremental approach to building customer-oriented systems that continually incorporate customer feedback ensures that systems are developed with the end user in mind. Leaders should work with the Office of Management and Budget (OMB) to explore existing approval mechanisms under the Paperwork Reduction Act (PRA), such as their generic clearance process, which can facilitate collecting customer feedback during systems development. Additionally, OMB's recently launched U.S. Digital Service provides agencies with resources to assist in incremental systems development, and improve customers' digital experiences.

Foster cultures of excellence in customer service.
Because improving services to citizens often requires a shift in agency culture and business processes, agencies should support customer service initiatives with clear change management and internal communications strategies. Agencies can institute awards to celebrate customer service achievements and establish communities of practice around customer service.

CONGRESS SHOULD:

Support funding for collaborative projects to integrate digital services across government.
Pilot cross-agency initiatives such as MyUSA, which is seeking to provide citizens with a single user account to manage multiple transactions across government agencies, could be transformational. However, funding such initiatives is complicated due to the siloed nature of federal appropriations. Additionally, agencies may be wary of contributing funds to cross-agency efforts that they fear could draw customers away from their websites or services. Congress can mitigate this challenge by appropriating funding specifically to support collaborative projects. Rather than requiring new funding, cross-agency projects can often be accomplished by better coordinating existing but broadly distributed resources.

Reexamine PRA to ensure that agencies have sufficient flexibility to collect and use customer and stakeholder feedback.
Many of the leaders we interviewed cited PRA approval processes as a significant hurdle to collecting customer feedback. Congress should reexamine the act to ensure that PRA continues to serve its primary objectives—to reduce the burden of government on citizens, ensure that agencies have high-quality data and ensure that collection of information is appropriate for its intended use—while not creating unnecessary barriers to collecting and using voluntary customer feedback.

Reexamine the Privacy Act to modernize the law for the realities of the digital age.
We live in a far more interconnected world than the one in which Congress passed the Privacy Act of 1974. Congress should reexamine the act and consider giving agencies more flexibility to securely share customer information with trusted partners in order to streamline services, especially when sharing that information is explicitly authorized by customers.

Continue to explore legislation that will encourage and enable agencies to provide better customer service.
The Government Customer Service Improvement Act that was introduced in both the House and the Senate in 2013 contains many valuable provisions, such as a requirement that agencies collect customer feedback regarding the services they provide.

THE OFFICE OF MANAGEMENT AND BUDGET SHOULD:

Identify opportunities to better integrate systems and customer interactions across government agencies, and direct agencies to collaborate when appropriate.
Agencies often need incentives to work across organizational boundaries to better serve shared customers. Many of the initiatives highlighted in this report were spurred into action by executive orders or OMB directives. OMB should continue to use its authority to encourage collaboration between agencies to better serve citizens.

Continue efforts to improve customer service through the administration's cross-agency priority goals.
OMB has recently begun several promising efforts, such as establishing a customer service community of practice. It also is planning to pilot a government-wide customer feedback mechanism, as well as an awards program to recognize and incentivize excellence in customer service.

Continue efforts to further streamline PRA approval process for customer and stakeholder feedback surveys.
OMB's Office of Information and Regulatory Affairs, which oversees implementation of PRA, recently introduced a streamlined approval process for voluntary customer feedback mechanisms, and should continue to ensure that agencies do not face unnecessary barriers in collecting and using customer feedback. For example, while the streamlined process has significantly sped some PRA approvals, it is currently not available for customer feedback surveys that are intended to be published, which limits the extent to which agencies are held accountable for service improvements.

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