



Government for the People

Designing for Equitable and Trusted Customer Experiences

NOVEMBER 2021



About the Partnership

The Partnership for Public Service is a nonpartisan, nonprofit organization that works to revitalize the federal government by inspiring a new generation to serve and by transforming the way government works. The Partnership teams up with federal agencies and other stakeholders to make our government more effective and efficient.

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Executive Summary

To address an ongoing crisis in public trust, the Biden administration should seize the opportunity to reset the federal government’s relationship with the public by taking a holistic, customer-first approach to federal services. The public-governmental relationship is shaped by dozens of interactions and moments that matter between individuals and agencies; negative interactions and inequitable treatment can have a lasting impact. The suggested approach requires federal agencies to move beyond reactive strategies that address the symptoms of bad customer experiences, and instead pursue the root causes of bias and distrust in service design and delivery.

Federal leaders have built a solid foundation of customer experience policy, practices and guidance in their efforts to better understand customers and build services with a customer lens. And the Biden administration has set an ambitious bar with new initiatives aimed at advancing equal opportunity. But with the momentum of a new administration, federal leaders should also take a hard look at the additional progress needed to reverse the public trust deficit and make lasting improvements.

THE CHALLENGES

First, though the public may be satisfied with some individual services, trust in federal institutions has been at historic lows for years, and agencies’ customer experience efforts are not capitalizing on the opportunity to improve it. Though public trust in our government is earned in the full scope of interactions people have with federal services, agencies too often take a transaction-by-transaction approach to improving services.

Second, these reactive approaches are exacerbated by real and perceived inequity in service delivery: Customers have different needs, histories, starting points and preferences that are not always recognized by federal agencies. For some agencies, understanding these barriers is a natural process with built-in methodologies and expertise; for others, the lens of equity is unfamiliar, and in some cases reveals uncomfortable truths.

KEY RECOMMENDATIONS

Achieving lasting change in federal services requires government to center its efforts on the customer—all possible and eligible customers—when designing and delivering services. The good news is the Biden administration made its intentions to address trust and equity clear. Four approaches can help fulfill this commitment.

- Create and implement comprehensive, ongoing and inclusive “listening” and research strategies for customer experience.
- Integrate services and service channels for a more seamless and equitable customer journey.
- Design and deliver services from the customers’ perspectives, using human-centered design, and measure the success of these efforts to reduce administrative burden.
- Strengthen organizational capacity—technology, talent and leadership—for equitable, accessible and customer-centered work.



(Photo by Philip Maramba/FEMA)

Introduction

Public trust in federal institutions is near historic lows at a time when people’s expectations of our government are increasingly high and evolving rapidly.¹ Experience with best-in-class commercial peers has set a high bar for how customers interact with government services, and the urgent needs of the COVID-19 pandemic have made the situation more acute.

For the past two years, the Partnership for Public Service, in collaboration with Accenture Federal Services, documented government’s progress on customer experience through our “Government for the People” report and profiles of agencies’ high-impact services. Federal leaders have built a solid foundation of customer experience policy, practices and guidance—with pockets of notable excellence and innovation—in their efforts to better understand customers and build services with a customer lens.

With momentum prompted by the new administration and the changes generated by the pandemic, federal leaders should also take a hard look at what’s needed to enable lasting change. The public’s expectations and trust are fragile, shaped by experiences people have interacting with an array of services. Families applying for financial aid for college, neighbors seeking assistance after a hurricane, colleagues filing for retirement benefits, and friends going through security in an airport are the only lenses through which many people see our government in action. Positive experiences build goodwill and trust, but even a single negative interaction can have a lasting impact on people’s faith in government and democratic institutions.

This year’s report makes the case that the government should reset its relationship with the public, taking a holistic view of the services it provides and focusing on the customer journey, rather than individual touchpoints or transactions. It suggests such a focus should be equitable and inclusive of all customers, particularly those who may need services most or struggle hardest to access them. This will require agency leaders to expand their perspectives beyond the most visible symptoms of customer experience challenges to address the root causes, a critical step to generating lasting trust and real positive change.

¹ Pew Research Center, “Public Trust in Government: 1958–2021,” May 17, 2021. Retrieved from [pewrsr.ch/3CgNLWP](https://www.pewresearch.org/ch/3CgNLWP).

For our research, we interviewed more than 50 leaders who oversee federal services and examined customer feedback data on high-impact services collected by agencies across service channels. In addition, we conducted an informal survey of the government community, seeking a better understanding of government’s ability to improve equity in federal services. Our work was informed by input from our quarterly customer experience roundtables as well as by leading commercial practices.



(Photo by NPS)

Harnessing the Momentum

Improving the customer experience with government services has been a White House priority for a decade, reflected in successive Presidential Management Agendas² and among agency leaders’ priorities.³ Through its first executive order, the Biden administration emphasized its intent to further harness the power of government to “advance equity to provide everyone with the opportunity to reach their full potential.”⁴ A series of administration policies have set an ambitious new bar, offering a much-needed path forward to assess and tackle equity and access challenges.

2 Performance.gov, “Trump Administration Archive: Improving Customer Experience with Federal Services.” Retrieved from bit.ly/3GocZot.

3 Bryant Jordan, “McDonald Lays Out ‘Breakthrough Priorities’ for VA in 2016,” Jan 21, 2016. Retrieved from bit.ly/3vU2FA0.

4 The White House, “Executive Order On Advancing Racial Equity and Support for Underserved Communities Through the Federal Government,” 13985, Jan 20, 2021. Retrieved from bit.ly/3E9sHSG.

BIDEN ADMINISTRATION CUSTOMER EXPERIENCE POLICY AND GUIDANCE

Executive Order “On Advancing Racial Equity and Support for Underserved Communities Through the Federal Government”: This ambitious policy recognizes that entrenched barriers in federal programs have denied many individuals and communities of color access to opportunity. The executive order tasks the Office of Management and Budget and federal agencies to compile methods to assess equity in federal services, identify barriers to equitable service delivery and provide resources to mitigate the challenges identified, and promote equity-oriented data practices.⁵ The administration met a milestone in this effort in July 2021 by issuing the Study to Identify Methods to Assess Equity: A Report to the President.⁶


Updated OMB Circular A-11, Section 280⁷ “Managing Customer Experience and Improving Service Delivery”: This updated planning and implementation guidance decisively elevates agency customer experience performance as a priority equivalent to financial or operational performance. It broadens the definition of customer experience to include equity, inclusion and accessibility, and designates eight additional High-Impact Service Providers. And it sets expectations that agencies should consider services from the perspective of customer journeys across different touchpoints and life events.

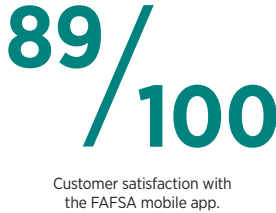
5 The White House, “An Update from the Equitable Data Working Group,” July 27, 2021. Retrieved from bit.ly/3nuPGRx.

6 Office of Management and Budget, “Study to Identify Methods to Assess Equity: Report to the President,” July 20, 2021. Retrieved from bit.ly/3pIC9bA.

7 Office of Management and Budget, “Managing Customer Experience and Improving Service Delivery,” 2020. Retrieved from bit.ly/3EimlR4.

Agency leaders and employees from the executive level to the front lines of service have proven to be remarkably innovative and resilient in the face of COVID-19 over the past two years, and are poised to bring these policies to life.

- Agencies such as the Department of Veterans Affairs have demonstrated it is possible to shift the mindset of an entire agency to a customer-first ethos. Its enterprise-wide, comprehensive customer experience initiatives raised trust in the VA among veterans by 24% since 2016.

Percentage trust increase among veterans.
- More than a decade of work to understand and reimagine the experience of applying for federal student loans resulted in Federal Student Aid transforming the end-to-end financial aid experience, including redesigning the Free Application for Federal Student Aid. What used to be a complex, paper-based process is now a simple one that can be completed on a smartphone. Customer satisfaction with the mobile app scored [89 out of 100](#).

Customer satisfaction with the FAFSA mobile app.
- More senior agency officials are directly responsible for the customer experience.
 - In 2016, only two agencies—VA and FSA—had chief customer experience officer roles. Now there are at least six, with Census, General Services Administration, the Internal Revenue Service and the Social Security Administration in addition to VA and FSA.

- Increased hiring and investments to secure customer experience and design expertise.
 - The first government-wide customer experience hiring action occurred in 2020.
- More agencies collecting and publishing customer feedback.
 - In 2018, only the VA collected and published customer experience feedback. In 2021, 18 organizations providing high-impact services are doing so.
- More success in fixing areas where customers had difficulty.
 - The Centers for Medicare and Medicaid Services made it easier to find and compare health care providers that accept Medicare.
 - U.S. Citizenship and Immigration Services made more personalized and precise case status updates available for some applications for immigration benefits.
 - The IRS expanded the availability of information and forms in languages other than English.
 - The VA is improving how veterans order and track their prescriptions.
 - FEMA shifted to virtual property inspections due to COVID-19, speeding up a critical process for disaster survivors.



(Photo by Alexander Zamora/CBP)

The Challenges: Distrust in Government and Inequity in Service Provision

“When we don’t meet their expectations, it actually undermines their trust in government. We undermine trust both in our competence and the extent to which we understand and care about those in need of our service.”

—CLARE MARTORANA, FEDERAL CHIEF INFORMATION OFFICER⁹

Federal agencies have two primary opportunities to fulfill the promise of a “government for the people.” First, though the public may be satisfied with some individual services, trust in federal institutions has been at [historic lows for years](#). Lack of public confidence in government has affected and been affected by:

- A pandemic affecting virtually every household in America—which demanded government provide services and information to every corner of the nation.

⁹ ExecutiveGov, “Federal CIO Clare Martorana: Government Should Serve as Blueprint for Diverse, Equitable Service,” September 16, 2021. Retrieved from bit.ly/3GlgLPA.

- A spotlight on systemic racism and inequality deeply intertwined with government institutions.
- Challenges to the federal electoral process and persistent threats to election integrity and voter access.

Trust and customer experience are complex. Academic literature shows much of the public does not associate many federal services with government, and indeed, indirect service providers often make it difficult for people to recognize that many services actually originate from the government. Thus, people often believe “good” service comes only from the private sector.¹⁰ Even when government “works,” its reputation can suffer when people believe it is not working for them.¹¹ But perceptions of government performance are a key ingredient of trust.¹² Can we better square perceptions with reality?

The Partnership and Accenture believe public trust in our government is shaped by the full scope of all interactions people—along with their families and communities—have when receiving federal services. Customer journeys during interactions with government offer them evidence of whether services are designed based on customer needs, or simply follow government paradigms and preferences. They also indicate whether individuals can be confident services will meet or exceed their needs in the future.

Today, customers on average rate their personal satisfaction with services higher than their trust in the program or agency. Though higher than measures of overall trust in government, measures of trust in programs and agencies are still the lowest-scoring element in newly published federal surveys on high-impact service providers.¹³ These surveys request customer feedback on overall satisfaction with a service, trust in that program, and five categories of “drivers” that shape experience. This disparity suggests **agencies’ customer experience efforts are not capitalizing on the opportunity to improve trust**. This data, though still in early days, echoes Partnership for Public Service findings in an ongoing public opinion study of trust: Although individuals may appreciate the parts of government they interact with frequently, such as the U.S. Postal Service and the Transportation Security Administration, these beliefs do not yet affect their views of the federal government overall.¹⁴⁻¹⁵

10 Amy E. Lerman, “Good Enough for Government Work,” 2019, University of Chicago Press. Retrieved from bit.ly/315iatu.

11 Niskanen Center, “Why Americans Dislike Government, Even When it Works” Sept. 3, 2019. Retrieved from bit.ly/3mfDu7y.

12 Marc J. Hetherington, and Thomas J. Rudolph, “Priming, Performance, and the Dynamics of Political Trust,” *The Journal of Politics*, Volume 70, Number 2, April 2008. Retrieved from bit.ly/3B17LpQ.

13 Performance.gov, “Improving Customer Experience with Federal Services.” Retrieved from bit.ly/3mjiwzdy.

14 The Partnership’s Redefining Government, Rebuilding Trust project is engaged in public opinion work on drivers of trust and distrust in government, employing focus groups, targeted online message boards and national surveys. Results have not yet been released.

15 Average percentage of respondents rating services four or five on a five-point Likert scale. Averages are for 21 service channels across 10 federal services. Customer experience drivers from OMB A-11 guidance. See methodology for more details.

Customer Experience Feedback: Average Ratings Across Agencies

Category	Oct 2020 - March 2021 Average	Oct 2020 - March 2021 Weighted Average*
Trust	66%	75%
Satisfaction	72%	83%
Service/Effectiveness	69%	82%
Process/Ease	69%	80%
Process/Efficiency	69%	80%
Process/Transparency	79%	93%
People/Employee	80%	93%

*Weighted to account for differences in the number of customers providing feedback on each service channel. Channels with more survey respondents contribute more to the average. See methodology for more details.

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“Equity isn’t additional work. Equity is actually meeting our respective mission.”

–SENIOR FARM PRODUCTION AND CONSERVATION OFFICIAL, USDA

The second major opportunity centers on improving equity in federal services. [Equity](#) is the “consistent and systematic fair, just, and impartial treatment of all individuals,” according to the executive order on racial equity. It recognizes customers have unique interests, histories, starting points and barriers that limit access to services or increase the need for them.

We see such disparities in many federal services. Due to historic inequities, some people in Black and Hispanic communities are less likely to be vaccinated against COVID-19,¹⁶ and small businesses in communities of color had unequal access to federal COVID-19 relief.¹⁷ Inequities can result from failure to reach customers where they are. Individuals and communities may lack access to the internet, transportation to reach federal facilities or legal services to help navigate federal programs.¹⁸ Many federal service providers presume everyone is familiar with their jargon and tailor their offerings to longtime customers, or do not fully appreciate relevant inconsistent history of engagement with marginalized communities that has lasting effects on equity, trust and participation in government programs.

The executive order on racial equity gave a much-needed push for prioritizing equity in the

16 Center for Disease Control and Prevention, “COVID-19 Vaccine Equity for Racial and Ethnic Minority Groups” Sept. 9, 2021. Retrieved from bit.ly/2XMUVmJ.

17 Sifan Liu and Joseph Parilla, “New data shows small businesses in communities of color had unequal access to federal COVID-19 relief,” Brookings, September 17, 2021. Retrieved from brook.gs/3nsZxac.

18 Census Bureau, “Computer and Internet Use in the United States, 2018.” Retrieved from bit.ly/3nx9B2l.

context of public services. But understanding service equity is a process that will require time and determination. In July and August of 2021, the Partnership for Public Service and Accenture conducted an informal survey of government officials to gauge their views on equity in federal services (see methodology below for information on how the survey was conducted). The overwhelming majority of our respondents (80%) “agreed” or “strongly agreed” delivering services more equitably should be a top priority for their agency. However, less than a third (27%) reported having the resources needed to do so, including funding, technology and staff expertise. PolicyLink, a national research institute focused on advancing equity, found similar gaps: Its survey of federal officials found 42% felt “prepared” or “extremely prepared” to address racial equity.¹⁹

Some of our respondents brought up the need to think broadly about equity and access, such as adjusting for people who are not comfortable using digital channels. For some agencies, understanding these barriers is a natural process; for others, the lens of equity is unfamiliar and, in some cases, reveals uncomfortable truths. As PolicyLink advises, understanding agencies’ roles in equity, their histories of bias and disparity, and the root causes of inequity requires serious and sustained focus—and these efforts are well aligned with customer experience principles of deeply understanding and designing for individual customer perspectives.²⁰

¹⁹ PolicyLink, “For Love of Country: A Path for the Federal Government to Advance Racial Equity,” July 2021. Retrieved from bit.ly/3nt9zZe.

²⁰ Ibid.



(Photo by Michael Medina Latorre/FEMA)

Four Key Recommendations

Achieving lasting change and impact in federal services requires the federal government to address the root causes, rather than the symptoms, of customer experience challenges. To do so, government needs to center its efforts on the customer—all possible and eligible customers, with an emphasis on those most in need of assistance—when designing and delivering services.

Agencies are often drawn to the symptoms of bad customer experience because they present clear visible to-do lists. This has generated extensive remedial activities over the past decade. Agencies have upgraded poorly designed websites, automated complicated processes, translated forms from jargon, and invested in traditional customer satisfaction surveys and transactional feedback platforms that provide information on what people say but do not reveal what they do or why. As successful as these efforts can be, **they often miss the issue of why those activities were needed, failing to identify or address the underlying issues from the perspective of the customer.** This game of whack-a-mole offers the potential for success only on the margins.

ADDRESSING CUSTOMER NEEDS FROM THE START

Leaders supporting the design and experience of Recreation.gov found they had a large and growing help center on their site for newer users, who reported lower-than-average satisfaction with their use of the popular site. In a key shift, designers are moving some of the most frequently referenced help center content to the primary webpages, so users do not have to constantly refer to a frequently asked questions page or other resources. And a new, simpler landing page welcomes first-time users. These moves, driven by new-user testing, are welcome. The opportunity now: how can Recreation.gov evolve to address customer needs from the start, and how might the underlying issues that diminish the experience be addressed?

The good news is the Biden administration made its intentions on trust and equity clear, and federal agencies have proven resilient and innovative through almost two years of COVID-19. Four approaches—some new, some building on agency success—can help fulfill this commitment.



Inclusive and ongoing customer research and listening

THE PROBLEM

*Federal agencies too often **fail to include underrepresented or marginalized voices** in their customer research.*

Agencies may be receiving generalized, limited or biased input and feedback when they:

- Rely on feedback channels that present the perspective of current or average customers.
- Design mechanisms for customers who complete transactions, rather than understanding why people struggle or drop out.
- Apply outdated user views and preferences that do not reflect current circumstances.
- Are unable to segment customer insights into different demographic groups or behavioral mindsets.



Agencies may start with openness in their customer listening, welcoming all feedback, but fail to “hear” underserved communities. Consequently, agencies may orient their customer experience approaches in favor of those with the fewest barriers to access, or neglect to recognize unique needs among distinct and evolving customer populations.

Or agencies may fail to perceive that their customer listening activities rely on a built-in presumption of trust: that feedback will be heard, that past discrimination will be mitigated, that insights will not result in repercussions, or that the engagement and intention is genuine. These limitations could further marginalize those whom the agency needs to hear from the most.

THE SOLUTION

Agencies should create and implement comprehensive, ongoing and inclusive “listening” and research strategies for the customer experience. Such strategies should follow the following principles:

- Start with what your agency **needs to know to better serve the full range of potential customers, rather than what information or customers** you have easy access to.
- Reflect the needs of **eligible** customers, not only existing ones, and use data to assess service gaps and opportunities.
- **Analyze** customer insights by specific populations or mindsets, rather than generalizing about the average customer.

- **Establish diverse, inclusive design teams** and identify unconscious bias that may affect how research goals are defined and findings are interpreted.
- Have a **well-communicated strategy** for why demographic information will be collected and how it will be protected, and how it will deliver value to customers.
- **Listen to customers** across all points of service.
- **Go where the customers are** through nontraditional customer listening channels such as online forums, social media and community meetings.
- **Generate partnerships** with trusted stakeholders to **engage** underserved communities.

Approaching “listening” from this angle shifts the focus from a symptom-centric approach—how do my current customers feel about my current offerings?—to a root-cause-centric approach—what are the specific public needs from my agency, what do I need to know to meet them, how might these vary across groups or over time?

Biden administration policy and guidance strongly supports this approach. The executive order on racial equity acknowledges the institutional harm of ignoring underserved communities. And the Equitable Data Working Group is currently assessing missing, inaccessible and underused customer data.²¹

Several agencies have found success through proactive and inclusive listening. Throughout the COVID-19 pandemic, the Department of Agriculture used targeted outreach and trusted community partners to hear from small farmers on how the crisis was affecting them. Insights from these sessions identified gaps in how these farmers were receiving aid under the American Rescue Plan. To address disparities, USDA reconceived programs such as Pandemic Assistance for Producers, proactively engaging key stakeholders to better understand their needs and barriers to access. “That front-end engagement is really critical to improving customer experience because you get a better product,” said Zach Ducheneaux, administrator for the Farm Service Agency. The USDA has also recently announced the Equity Commission to advise USDA on addressing “barriers to inclusion or access, systemic discrimination.”²²

The Federal Emergency Management Agency has examined why specific populations were not applying for disaster assistance. “The first thing we have to do is really understand who the survivors [in a disaster] are,” a senior disaster assistance official at FEMA noted, “and who among them are applying for assistance. Without that, we’re moving blindly.” For example, individuals with disabilities have historically been underrepresented in the data FEMA collects about assistance recipients. FEMA’s targeted outreach identified several real and perceived barriers to indicating disability on applications for assistance, such as lack of clarity on what constituted a qualifying disability. Addressing those barriers enabled FEMA to better understand the needs of these populations and how agency policies affected them, and led to more targeted outreach to educate people on what benefits are available—for example, on when accessibility needs such as wheelchair ramps are not impacted by assistance caps.²³

21 The White House, “An Update from the Equitable Data Working Group,” July 27, 2021. Retrieved from bit.ly/3nuPGRx.

22 Department of Agriculture, “Intent To Establish an Equity Commission and Solicitation of Nominations for Membership on the Equity Commission Advisory Committee and Equity Commission Subcommittee on Agriculture,” 2021-20840, Oct. 2021, 53265-5326. Retrieved from bit.ly/30UtQ20.

23 FEMA, “Individual Assistance Program and Policy Guide,” FP 104-009-03, May 2021. Retrieved from bit.ly/2Zna52z.

“The first thing we have to do is really understand who the survivors [in a disaster] are and who among them are applying for assistance. Without that, we’re moving blindly. We’re not able to fine-tune our programs to improve our support.”

–SENIOR DISASTER ASSISTANCE OFFICIAL, FEMA

Such customer-centered work is essential to resetting agency approaches, and expanding data and analytics work across agencies will help accelerate progress. The Partnership and Accenture’s informal survey on equity explored to what extent agencies collect data to understand the experience underserved populations have when they seek services from government. Though only an initial picture, the responses showed agencies have a long way to go until data and applied intelligence become effective tools for advancing equity and transforming experience.

Some 35% of respondents reported their workplaces collect “none” or only “a little” relevant data. In cases where any amount of data was collected, 36% of respondents indicated their agencies “rarely” or “never” use that kind of data to modify or redesign services to improve equity. Several respondents elaborated on their answers: one sharing that “data collection is in its infancy at the moment,” and another reporting “a severe lack of people who know how to collect and analyze this type of data.”



Integrate services for a more seamless customer journey

THE PROBLEM

*Federal agencies often **focus on improving individual services or service channels**, rather than integrating them into a seamless customer journey across channels, programs or levels of government.*

Individuals facing a crisis, making a significant life change or simply trying to manage a planned event like a change of address do not start with the question of “what government agency can help, and what’s the best way to reach it?” They start with their needs. Agencies can better address those needs by better integrating customer engagement with separate channels **within** individual services, such as applying for benefits in person, online or over the phone. They can also improve how customers work with **intersecting programs** they may encounter, particularly during priority life events²⁴—both those that are planned, such as retirement, and those that are not, such as food insecurity.

24 OMB defines “priority life events” as events that require members of the public to navigate a service (or services) across the boundaries of multiple Federal programs, agencies and/or levels of government.

During the pandemic, agencies made gains in broadening the number of channels customers can use to access services. These channels can range from in-person consultations, mobile applications and contact center phone calls to automated online chat, social media, web-based self-service and more. Multichannel or omnichannel approaches, done well, are a critical element of consistent, equitable and accessible service delivery, and OMB encourages them in its latest A-11 guidance.

Still, some agencies continue to struggle to deliver consistent and personalized services across channels, due to programmatic siloing or lack of access to digital programs and modern technology. Different channels may offer disparate levels of service or inconsistent information—for example, an online self-service application may use more formal terminology than a contact center employee who can gauge a person’s mindset during a conversation. Or they may present different capabilities, such as when application statuses can be determined only over the phone. If customers struggle to connect with agencies for services, it can lead to reduced trust in government, particularly if physical, emotional, social, psychological or economic concerns led them to seek assistance.²⁵

This potential disconnect grows more complex when customers navigate across several programs within an agency, or even across agencies and levels of government. To a customer, a “priority life event”²⁶ does not come with a federal organizational chart or a roadmap.

Regardless of an agency’s strategy for engaging with customers, it may find that customers’ trust can vary by different customer groups and the channels they choose, as well as their experiences with government to date. Although the pandemic led agencies to increase investments in online service, agencies’ customer feedback data reported to OMB for the first half of 2021 shows people have less trust and confidence in government’s digital and self-service options than they do when connecting directly with an agency representative.²⁷

Customer Experience Feedback Oct 2020-Mar 2021: Average Trust Ratings by Channel Type

Online Average	Online Weighted Average*	Phone/In-Person Average	Phone/In-Person Weighted Average*
63%	68%	71%	79%

**Weighted to account for differences in the number of customers providing feedback on each service channel. Channels with more survey respondents contribute more to the average. See methodology for more details.*

Created with [Datawrapper](#)

For example, though the Transportation Security Administration worked to improve the utility of its website, many customers first find information on TSA.gov and then reach out through other channels to confirm what they are reading is accurate. TSA staff believe that what they are seeking is reassurance for high-stakes decisions, and are exploring options like automated chatbots on their website to address this need. Understanding why customers have different levels of trust in channels, and investing accordingly, is critical for all agencies.

25 Ryan W. Buell, “Elevate Employees, Don’t Eliminate Them,” Harvard Business Review, Sept.-Oct. 2021. Retrieved from bit.ly/3nFYsMv.

26 As defined by A-11 guidance, these are events that require members of the public to navigate a service (or services) across the boundaries of multiple federal programs, agencies and/or levels of government. Examples might be retirement or food insecurity.

27 Average percentage of respondents rating services four or five on a five-point Likert scale. Web averages are for 10 service channels across seven federal services; phone/in-person averages are for eight service channels across six federal services. Customer experience drivers are from OMB A-11 guidance. See methodology for more details.

Agencies may be inadvertently diminishing trust in the services they deliver across channels and programs when they:

- Overlook reasons behind consistent drop-off points—when customers don’t complete a transaction—or repeated channel switching around particular services.
- Find disparate levels of trust or satisfaction among channels providing the same services.
- Lack connectivity between channels—for example, lack of customer history on all channels or a requirement to report data they previously provided in other channels—or lack the ability to share customer data among intersecting programs.
- Use different terminology in different service channels and intersecting programs.



EXAMPLES OF FEDERAL AGENCY TOUCHPOINTS IN PRIORITY LIFE EVENTS

Embarking on an Overseas Trip



Applying for Disaster Relief



THE SOLUTION

Agencies should ensure equitable service delivery across channels and over the course of a customer's journey, especially for priority life events, following these principles:

- Modernize service channels as part of an **overall customer journey and ecosystem**, rather than individual touchpoints and transactions, using evidence-based insight to create a seamless experience.
- Provide consistent **information on products and services** across all channels.
- **Make customer documentation requirements consistent** across channels and intersecting programs related to priority life events.
- **Revise policies and regulations** that restrict data-sharing or create duplicative data requirements, using a customer-centric lens.
- **Proactively and securely share information** with partner agencies and external stakeholders who have overlapping customer communities, and leverage effective communication channels.
- Create analytic strategies to **define customer segments and populations—and identify trends and common needs**—across services, not just within individual programs.
- Work with customer communities to identify solutions for **increasing trust in service channels**: for example, personalized self-service websites and intelligent systems that anticipate customer needs and proactively deliver information.

Today, OMB's A-11 guidance encourages developing multichannel solutions, with a balance of traditional and digital methods. As progress occurs, agencies should not overlook seemingly minor distinctions in service across channels. For example, the Social Security Administration provides customers with benefit verification letters, which they may need to share with other parties to qualify for services. These letters can be requested in person, over the phone and online, but SSA found many people would go to field offices to obtain these letters, even if it took longer, because they had a different, more official-looking design. In 2020, SSA standardized these letters so that regardless of channel, they all look the same. The agency expects this change will lead to more people accessing the letter online, and is collecting data to determine if that is the case.

“We’re looking at all of our services from an omnichannel perspective. Whereas in the past we might have created individual solutions for each channel, that would breed discrepancies between the outputs.”

—ERIC POWERS, SOCIAL SECURITY ADMINISTRATION

This year, Center for Medicare and Medicaid Services focused a great deal of effort on improving the customer experience for those who are new to Medicare, looking at the experience holistically across the many ways people can interact with and get information from the service. They launched an improved “Get Started with Medicare” section on [Medicare.gov](https://www.medicare.gov) that helped new enrollees find and follow the information needed to make decisions about their coverage. CMS also began a pilot at the 1-800-Medicare call center where new-to-Medicare beneficiaries and first-time callers are being offered a “concierge”-style callback that will help them with confusing first-year decisions and tasks. They also made improvements to the Initial Enrollment Period (IEP) package that is mailed to beneficiaries roughly three months before they turn 65 (or otherwise become eligible) and includes their Medicare card, a letter describing their options and a booklet about coverage choices. These refined communications channels provide easy-to-understand information about how to make coverage decisions that are best for the beneficiary. By addressing this experience across many channels, CMS hopes to alleviate some of the confusion new-to-Medicare beneficiaries face.

Integrating different agencies’ work across related programs is more complicated. As a start, OMB has collaborated with an initial set of service providers to develop cross-agency customer journey maps for three complex experiences: military service members transitioning to veteran status and seeking employment; disaster survivors seeking assistance; and transition to adulthood for individuals with intellectual disabilities. It is also committed to providing resources on designing for priority life events.²⁸ Some agencies, such as the departments of Defense and Veterans Affairs, are already collaborating closely on facilitating customer journeys across more than one service or agency. But some of the burden for such a fundamental shift will fall on Congress due to statutory requirements in program design.



Improve access and reduce burden by designing from the customers’ perspective

THE PROBLEM

People may face excessive barriers to access government services, and federal agencies do not fully consider these administrative burdens.

Scholars Don Moynihan and Pamela Herd define administrative burden as the “costs that people encounter when they search for information about public services (learning costs), comply with rules and requirements (compliance costs), and experience the stresses, loss of autonomy or stigma that comes from such encounters (psychological costs).”²⁹ These barriers and points of friction emerge for a range of reasons—politics, bureaucracy, security—but ultimately because government services have been set up from the perspective and preferences of government.

Barriers may result from procedures aimed at public stewardship, or they may be due to the real need to prevent waste, fraud and abuse. They may result from real or perceived disparities in service experiences, such as security screening based on behavioral cues. Or they

²⁸ Performance.gov, “Mapping the cross-agency customer experience,” Jan. 2021. Retrieved from bit.ly/3mei2ju.

²⁹ Pamela Herd and Donald P. Moynihan, “Administrative Burden: Policymaking by Other Means,” Russel Sage Foundation, 2018. Retrieved from bit.ly/3pFJxog.

may be the result of measures that limit eligibility for government services, such as income caps or work requirements for federal benefits. Regardless, administrative burden can have a profound impact on equitable service delivery, and federal agencies are only beginning to develop methodologies for identifying, measuring and mitigating it.

Agencies may be placing administrative burden on eligible customers when they:

- Fail to recognize different customer “starting points” in accessing services.
- Require identity verification processes less accessible to specific populations, such as through credit monitoring services.
- Build in requirements demanding customers go through potentially inaccessible steps: for example, in-person appointments, ink signatures, printed photos, or original or notarized documents.
- Offer multilingual services without consideration of cultural context in translation.



THE SOLUTION

Focus on the full range of customers when designing and delivering services by using human-centered design practices, and measure the impact of efforts to reduce administrative burden.

Current federal [policy](#) suggests agencies take a human-centered approach to service delivery and asks that agencies regularly assess their capacity to perform at this level. Recent updates to OMB’s A-11 guidance require agencies to measure customer experience feedback, equity and burden. And the executive order on racial equity requires agencies to complete equity assessments that detail administrative burden and create an investment plan to address the barriers they find. **Taken together, these policies offer a generational opportunity for remarkable progress in advancing agencies’ capacity to serve all people equitably.**

But policy and intent are only the first steps. Agencies face real tradeoffs and challenges in addressing the glut of administrative burden embedded in federal programs. The administration’s study of methods to assess equity notes the work of equity is not undertaken in a few speeches or budget years but “typically involves complex, long-term change management.” Agencies should prepare themselves to invest in the long-term change management required to reduce administrative burden and increase accessibility of their services by applying the following principles:

- **Design—or redesign—with, not for, the customer** to identify and address policy, product and service-specific barriers and burdens.
- Recognize the **historical context** of government engagement with marginalized and underserved populations.
- Use **evidence when evaluating administrative burden**; for example, to determine if security or fraud prevention requirements are cost effective—does reducing identity verification requirements increase or decrease improper payments?
- **Design for accessibility**, recognizing the need for both universal access and accommodation for those who have been historically excluded.
- **Minimize the requirement** for customers to seek help from a third party to access services or, when required, recognize those third-party needs.

- Design business models that address outcomes tied to **mission impact, not output**. For example, measure the success of self-service capabilities and impact on other channels.
- Identify opportunities for **proactive customer engagement**, including intelligent systems that anticipate customer needs and can offer assistance or information before people seek it.

Centering service design on how customers approach needs will go a long way toward addressing root causes of administrative burden, as will understanding such barriers are often systemic, not superficial. As agencies make these shifts, they can benefit from several success stories.

The experience of the COVID-19 pandemic proved to many agencies it was possible to rapidly stand up secure and widely available online services. The IRS is one of many agencies with strict online identity verification requirements aimed at reducing errors, fraud and abuse. But these requirements have prevented many customers from accessing the IRS' online services—in fiscal year 2020, only 42% of taxpayers attempting to verify their identity and register for a new online account were able to meet IRS' authentication standards, which may require credit card or mortgage account information.³⁰ Recognizing this burden, the IRS is now testing the Secure Access Digital Identity program, which will provide additional options for people to verify their identity, such as using utility bills or driver's licenses.³¹ If successful, other agencies could pursue similar methods of verification.

“We think it’s just good government. It is a way for us to be able to again make sure that we are protecting that data, but also offer that opportunity for people to be able to authenticate.”

–KEN CORBIN, CHIEF TAXPAYER EXPERIENCE OFFICER

Many organizations have recognized the burden posed by agencies' inability to provide status updates and processing times to customers, particularly in multistep processes that have a significant impact on customer livelihoods. U.S. Citizenship and Immigration Services has, as a rule, presented processing times for most applications as broad ranges, in many cases months or years—a significant point of stress for customers. But in a recent reform, the agency made personalized, analytics-based processing times available for some forms, for applicants with online accounts. These updates enable customers to plan ahead with the assurance that their application is moving forward. The information also reduces the need for applicants to call USCIS.

More broadly, federal agencies should be completing their own calculations of inequity driven by policy barriers and administrative burden, based on guidance in the executive order on racial equity. Agencies should also take advantage of the executive order's requirement to prioritize investments necessary to tackle these challenges in their upcoming budget proposals.

³⁰ National Taxpayer Advocate, “2020 Annual Report to Congress.” Retrieved from bit.ly/2YgEoHS.

³¹ IRS, “Secure Access Digital Identity,” June 10, 2021. Retrieved from bit.ly/3EhcqLj.



Strengthen the organizational capacity for equitable, accessible and customer-centered work

THE PROBLEM

Agencies may have the right customer experience policies and mindsets, but lack organizational structure, talent and technology to design customer-focused services from the beginning.

Federal leaders can stand behind the groundbreaking customer experience and equity policy and guidance of the current administration, but if they do not provide resources to their agencies' engine rooms of listening, design and delivery, they will struggle to implement that policy.

“This stage can be the most frustrating one. We’re building the capacity to produce amazing things. But most people don’t care about how great it is to build the factory—they care about how great the final product is.”

—PAUL FUNK, SENIOR ADVISOR AT THE SOCIAL SECURITY ADMINISTRATION

Attention to agency leadership, skills and organizational design is particularly important for the Biden administration priority on equity in service delivery. A critical point in the administration's study on methods to assess equity is to center on the customer, but it is not simply a matter of creating a new office or adding to the staff.³² It is a fundamental mindset shift on several fronts, demanding strong leadership to embed that mindset into core agency functions.³³ And, based on our informal survey of the government's current capacity for equity, at many agencies the talent, technology and resources needed remain in short supply.

Agencies should be concerned about their organizational capacity for customer experience work if they:

- Rely on volunteers or secondary duty assignments for critical customer experience expertise.
- Launch digital solutions without understanding their accessibility or connection to customer needs.



³² Office of Management and Budget, “Study to Identify Methods to Assess Equity: Report to the President,” July 20, 2021. Retrieved from bit.ly/3plC9bA.

³³ PolicyLink, “For Love of Country: A Path for the Federal Government to Advance Racial Equity,” July 2021. Retrieved from bit.ly/3nt9zZe.

- Approach customer experience measurement from financial or operational perspectives.
- Approach the customer experience, human-centered design or equity and accessibility as siloed or secondary functions.

THE SOLUTION

Agencies should incorporate customer experience and equity principles into their core processes and functions, reviewing talent, technology, strategy and organizational processes and structures. To set themselves up for success, agencies should embrace the following principles:

- Invest in a **dedicated workforce** for human-centered design, user experience, equity, data and evaluation—whether through hiring, contracting, professional development or partnerships.
- Use annual customer experience capacity assessments (directed by A-11) to drive **annual budget submissions, embracing customer experience functions as core to mission delivery**.
- **Make it routine to add customer experience elements** into strategic planning, learning agendas, evaluation, budgeting and other agency governance processes.³⁴
- **Modernize infrastructure** to power customer-centric systems and leverage digital tools and intelligent technologies to enhance customer experience efforts.
- **Elevate responsibility for customer experience outcomes** to agency leaders and use the President’s Management Council for accountability.

Several agencies have recognized the need to invest in themselves to advance the customer experience mission. At Federal Student Aid, a key factor behind recent increases in customer satisfaction has been the agency’s enhanced capability to conduct user research to inform design and product management. FSA made a point of hiring experts for a new directorate with this mission, recognizing it needed staff members with deep expertise in product design and user research who could work full time in those areas. The new directorate also formalized the processes FSA uses to build and launch new products, creating consistency and cohesion. “Having a team that is accountable for this work is very significant,” Jessica Barrett Simpson, former manager for the digital and customer care program, said, enabling FSA to ensure the agency creates products with customer needs in mind from the beginning. And improvements can be rolled out more quickly, according to FSA officials.

The Veterans Health Administration is redesigning clinical contact centers with veterans’ experiences in mind. The redesign, aimed for launch at the end of the year, will enable contact centers to transfer some medical questions to providers, while contact center staff members address basic administrative, scheduling and pharmacy questions. This move brings veterans closer to their medical care objective in a single call. Medical providers can help triage these customers’ needs, addressing urgent issues over the phone and saving trips to the emergency room. This is a good example of VA’s model for designing “easy, effective and emotionally resonant experiences that build trust,” Jennifer Purdy, executive director for patient experience, said. To help achieve this, the VHA is transitioning the clinical contact centers away from a facility-based model toward a consortium model that brings together several contact center teams. This will help enable the department to manage demand across the VA more effectively.

³⁴ Office of Management and Budget, “Study to Identify Methods to Assess Equity: Report to the President,” July 20, 2021. Retrieved from [bit.ly/3pIC9bA](https://www.eo.gov/briefing-materials/2021-07/Study-to-Identify-Methods-to-Assess-Equity-Report-to-the-President).

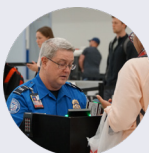
Overview of 15 Federal Services

This report and associated agency profiles examine customers' experiences with 15 federal services that are among those with the highest volume of direct contact with the public. For the first time, we are also considering the role of equity in these critical services, and how to enable a customer-centered lens that improves trust.

AIRPORT SECURITY SCREENING AND PASSENGER SUPPORT SERVICES

[Transportation Security Administration](#)

How can TSA ensure traveler screening is conducted with respect and courtesy and without regard to a person's race, color, sex, gender identity, national origin, religion or disability?



CUSTOMS SECURITY AND SCREENING SERVICES

[Customs and Border Protection](#)

How can CBP, as the entry point to the United States, provide safe and positive interactions with its diverse customer base, and provide an equitable approach to security and screening services?



FEDERAL STUDENT AID SERVICES

[Office of Federal Student Aid, Department of Education](#)

How can the Department of Education enable access to a world-class education that will empower students, including traditionally underserved students, to reach their potential and succeed?



CITIZENSHIP AND IMMIGRATION APPLICANT SERVICES

[U.S. Citizenship and Immigration Services](#)

How can USCIS design and deliver services that reflect its diverse customer base and promote dignity and fair treatment for everyone?



FARM LOAN AND CONSERVATION SERVICES

[Department of Agriculture](#)

How can USDA address historical inequities among its customer base, address barriers to access to its services, and ensure USDA programming is inclusive of all employees and all customers?



INDIVIDUAL TAXPAYER SERVICES

[Internal Revenue Service](#)

How can the IRS design and deliver taxpayer services to ensure everyone can meet their tax obligations without undue burden and receive tax benefits and other IRS-led relief they are eligible for?



DISASTER RELIEF PROGRAMS

[Federal Emergency Management Agency](#)



How can FEMA deliver better services and individual assistance to marginalized and other vulnerable populations, reducing barriers and increasing opportunities so all people can get help when they need it?

RETIREMENT SERVICES FOR FEDERAL EMPLOYEES

[Office of Personnel Management](#)



How can OPM ensure its highly diverse customer base of current and future federal retirees and their families are well prepared for retirement and have access to the data, tools and planning they need?

RECREATION RESERVATIONS FOR FEDERAL LANDS

[Recreation.gov](#)



How can Recreation.gov promote fair and equitable access to public lands regardless of customer income, ability and background?

VETERANS EDUCATION AND TRAINING BENEFITS

[Veterans Benefit Administration](#)



How can VBA equitably design and deliver education benefits for its highly diverse customer student-veteran population—ranging from 18 to over 70, over half of whom identify as members of an ethnically diverse group, and including many first-generation college students?

TRADEMARK REGISTRATION AND MAINTENANCE

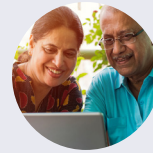
[U.S. Patent and Trademark Office](#)



How can USPTO encourage and remove barriers to innovation across all communities?

MEDICARE CUSTOMER SUPPORT SERVICE

[Centers for Medicare and Medicaid Services](#)



How can CMS address disparities in health and health care that persist across specific populations, particularly those who experience worse health outcomes, limited access to health care services, and lower quality of care?

PASSPORT SERVICES

[Bureau of Consular Affairs, State Department](#)



How can the Department of State work within security and statutory requirements to ensure equitable access to passports, for which all U.S. citizens are eligible, but less than 40 percent apply?

SOCIAL SECURITY RETIREMENT SERVICES

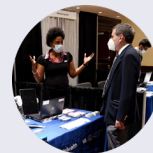
[Social Security Administration](#)



With a customer base that touches virtually every American, how can SSA eliminate barriers some customers face in accessing services and information?

VETERANS OUTPATIENT HEALTHCARE SERVICES

[Veterans Health Administration](#)



How can VHA provide individualized health care to each veteran in a way that eliminates disparate health outcomes and assures health equity?



(Photo by Barry Bahler/DHS)

Conclusion

Government will be successful in tackling the big challenges facing our country only with the public's trust and a fundamental reset of the relationship it has with the people it serves. Federal leaders have made sustained progress in improving the customer experience with government services, increasingly conducting customer research, simplifying complex processes and dedicating agency resources toward customer experience efforts. But it is now time for the next stage of government's customer experience evolution.

The principles outlined above—inclusive and ongoing customer research, integrated services to create seamless customer journeys, services designed from the customers' perspective and increased organizational capacity—provide a blueprint for how government should approach the customer experience in this new era. Government must center its focus on the customer experience, making it a central tenet of all services from the beginning and explicitly prioritizing equity and trust. It will require serious and public commitment across government, from the senior officials to the frontline employees who serve customers every day, to live up to the promise of a government for the people.

A Look Back: Key Principles from Government for the People 2020

Three service delivery principles:

- Quickly understand changing customer needs and pivot accordingly.
- Empower employees to deliver services to anywhere, from anywhere.
- Implement self-service capabilities more quickly.

Agency best practices:

- Set key performance measures based on customer feedback.
- Assign a senior executive to lead on customer experience.
- Collect, analyze and share customer feedback publicly.
- Provide support and answer questions on social media.
- Focus on the experiences of caretakers and others who help individuals or family members navigate federal services.
- Manage customer experience as an enterprise-wide effort.

Government-wide recommendations:

- Set an ambitious, government-wide goal to improve customer trust in government.
- Create a centralized team to manage customer experience efforts with a government-wide perspective.
- Establish a standardized position description for customer experience strategists in government.

Appendix I: Methodology

METHODOLOGY: DRIVERS OF CUSTOMER EXPERIENCE

This analysis is based on customer feedback data collected by agencies in line with guidance in OMB Circular A-11, Section 280. Agencies collecting data that meets these guidelines submit quarterly reports of the data to OMB, which are then displayed on [performance.gov](https://www.performance.gov). This analysis is based on copies of these quarterly reports that agencies provided to the Partnership. Data in this analysis covers the first two quarters of fiscal 2021, from September 2020 to March 2021.

A-11 guidance identifies seven “drivers” of customer experience that agencies should measure when collecting feedback from customers: trust, satisfaction, service effectiveness, process ease, process efficiency, process transparency and people. In their quarterly reports, agencies identify which question on their feedback surveys aligns with each driver. The Partnership grouped question-level results by driver to produce this cross-agency analysis.

Average Ratings Across Agencies

This analysis includes customer feedback data for 21 service channels across 10 federal services. Averages are the average percentage of respondents rating services four or five on a five-point Likert scale. For a few yes/no questions, the percentage of respondents answering yes is used instead. The percentage of respondents answering four or five was calculated for each service channel and then averaged across channels to produce the cross-agency average.

We also calculated a weighted average to account for differences in the number of respondents providing feedback on each service channel. Across the 21 channels, sample sizes range from 67 responses to 331,080 responses. Weights were assigned to each service channel based on the percentage of total responses in each driver category that came from that channel. For example, there were 892,652 total responses to questions in the trust category. A service channel with 288,290 responses was assigned a weight of 0.32, while a channel with 6,790 responses was assigned a weight of 0.01. The percentage of respondents answering four or five for each channel was multiplied by the weight for that channel, and those weighted percentages were then added to find the weighted average rating for each driver.

Average Ratings by Channel Type

To compare customer feedback across channel types, the 21 channels were separated by type into two categories: online services and phone/in-person services. Averages for online services include 10 service channels across seven federal services, including agency websites (for desktop and mobile devices), authenticated online accounts and email correspondence with agencies. Averages for phone/in-person services include eight service channels across six federal services, including a variety of agency call lines and in-person medical and inspection services. Three service channels included in the overall analysis were not included in the channel analysis because the data provided by the agencies aggregated customer feedback across channels and could not be separated into a particular category.

Ratings for the process transparency and people drivers are not included in the channel type analysis because these questions are typically not asked about online services.

Averages and weighted averages in this analysis were conducted using the same methodology as the cross-agency analysis.

METHODOLOGY: EQUITY IN FEDERAL SERVICES SURVEY

The survey was conducted by the Partnership for Public Service with the goal of better understanding the federal government community's views of equity in federal services.

The survey consisted of 19 questions, 12 of which were asked of all respondents, and six additional were asked of those who chose particular answers for the 12 core questions. Of the total number of questions, nine questions were closed-ended, generating quantitative data, and 10 were open-ended, generating qualitative data. Two of the closed-ended questions were matrixed—asking respondents to rate multiple items (nine items for the first question and six for the second) using the same scale.

The questions addressed the respondents' perceived importance of equity, leadership buy-in, availability of resources to tackle equity-related issues, availability and use of relevant data, significant barriers, co-designing services with representatives of underserved communities, and other related issues.

The survey was conducted online. It went live on July 28, 2021, and closed on Aug. 20, 2021. The survey was distributed to the federal government employees who, in the past, had indicated their professional interest in the government customer experience. They also had the opportunity to share the survey link with their colleagues. A total of 86 responses were collected. The respondents were not required to answer all questions in the survey, which resulted in fluctuations in the total number of responses to several questions.

Limitations

The survey is not statistically representative of the federal government community. However, the survey distribution was primarily targeted at federal government employees whose positions bring them close to the customer experience and equity-related issues, and the sample gives a good indication of this group's views. Further research in this direction is recommended to support the findings of this survey.

Appendix II: Acknowledgments

The individuals listed below generously offered their input on this report. We greatly appreciate their time and counsel. However, the contents of this report do not necessarily reflect the views of those we interviewed. Additionally, the views of participating federal officials do not necessarily reflect positions or policies of the federal government or its agencies.

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