Customer Experience Summit 2024:
Key Takeaways
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Key Takeaways

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Government Customer Experience & Engagement Summit

Innovating Government Services to Redefine the Customer Experience

The Westin Washington, DC Downtown

Customer Experience Summit 2024

Key Takeaways

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Executive Summary

The Customer Experience Summit is a premier event for the digital services industry, attracting an audience of professionals from various sectors. This packet provides an overview of the key topics covered at the event, including fostering trust in the government, automation to improve CX, employee experience, and data capabilities. Each section offers insights into the latest trends, challenges, and opportunities shaping the future of customer experience.

Sales and marketing teams of relevant vendors should keep an eye on the developing trends in the customer experience tech space and use the opportunities for strategic sales plays.

Please reach out to Hannah.biggs@carahsoft.com or the Market Research Team at Research@carahsoft.com if you have any questions or would like more information.

🤝 Building Bridges: Fostering Trust in Government

Catherine Manfre, Chief Transformation Officer, Office of Personnel Management

- ❖ The first step in OPM's digital transformation journey was stabilization, as a result of instability brought on by the previous administration. Alongside delivering major initiatives, OPM was focused on three key priorities:
  - o Building the organization's capabilities.
  - o Make OPM the premier human capital data provider.
  - o Enhance the customer experience it offers.
- ❖ From a customer experience perspective, OPM emphasizes a people-first approach, including both customers and employees. The customers encompass job applicants, agency leaders, HR leaders, and employees receiving benefits. Each of these groups has unique journeys and needs. Understanding these journeys and their intersections is crucial for collaboration and thorough digital tools. A successful CX practice is an end-to-end process ensuring the right people are in the right places at the right times.
- ❖ OPM's work significantly impacts real people, which is the core reason behind its focus on customer experience. Building trust involves providing consistent, predictable, high-quality services.
- ❖ Currently, OPM is piloting an online retirement application to enable digital applications, focusing on capacity, data, and customer experience.
- ❖ Regarding service inventory, OPM is identifying its services and their respective audiences, and determining if there is any overlap. This process helps streamline services and ensure they are effectively targeted.
- ❖ Human capital data is critically important. OPM published its first data strategy a year ago, outlining its vision for providing data to the public workforce. The goal is to maintain clean data that can be securely housed with governance standards in place. This foundational data supports the creation of data products such as dashboards on human capital initiatives.
- ❖ Looking to the future, OPM will continue to focus on data and the HR workforce. The online retirement application will be tested and refined based on pilot results. There will also be an emphasis on skill-based hiring, so the right skills are brought into government regardless of where they were acquired.

🖥 Automation for Improved Customer Experience

Nathaniel George Booker, Mayor, Maywood, Illinois

- ❖ In Maywood, Illinois, employees are the main customer of the cities government because they use technology every day. By taking care of the employees, Maywood taking care of the citizens. Employees who are given the proper tools to do their jobs will be able to better deliver services to the public.

- The city is particularly proud of the new HR system, which allows employees to print their own checks and update their finances on the computer system. This system is also used by the city to process payroll and authorize overtime.
- Maywood is using automated systems to reallocate funds, allowing them to work smarter, not harder. The money saved from these efficiencies has been used to add more staff at no additional cost. This strategic use of resources has enabled Maywood to improve services without additional financial burden.
- AI helps Maywood work smarter, not harder. They have not laid anyone off during the integration of AI into their practices, and productivity has increased.
- Due to integrating AI into digital tools, residents can now report issues in real-time online, eliminating the need to wait on the phone.
- Maywood chooses to add third-party partnerships to enhance services without increasing staff numbers. This approach helps to maintain efficiency while providing better service to our residents.
- The accuracy of chatbots can be improved by teaching them the specific phrasing used by residents.

Jill Leyden, VP of Public Sector Strategy, Qualtrics

- AI plays a significant role in enhancing our chatbots, helping residents quickly find what they are looking for. This prevents residents from having to search the website on their own and saves them time, making the process more efficient and user-friendly.
- Government agencies making their websites more user-friendly saves time and resources by reducing the need for direct assistance through phone calls or in-person visits, streamlining access to information and services, and minimizing errors and redundancies in user interactions.

Leading the Way

Ruth Buckley, Deputy Assistant Administrator, USAID

- Improved employee experience directly enhances customer experience, and vice versa. This is challenging when staff are exhausted and living in a time of crisis.
- The employee experience encompasses the why, what, and where of their work: why they come to work, what they do, and where they perform their duties. Customer experience focuses on understanding what customers need from us and when they need it.
- A better customer experience positions the organization to achieve its goals of reducing poverty and improving democracy. To foster this, USAID encourages staff to step outside of their comfort zones. This has challenged the agency at points as many employees are risk adverse.
- To facilitate collaboration, USAID has launched Workwithusaid.gov, a new platform that makes it easier for partners to work with the agency. This platform offers resources in multiple languages, including how-to guides for handling federal procurement regulations.

Matt Mandrgoc, Head of Public Sector, Zoom

- ❖ Hybrid and remote work models are beneficial because they allow Zoom to hire from anywhere in the country, thus accessing a larger pool of applicants.
- ❖ Human connection is crucial to maintain in a hybrid work setting. Having employees turn on their cameras and leveraging technology to facilitate the human connection have been beneficial.
- ❖ One of the main reasons people leave jobs because of their bosses. Understanding employees' situations and creating a supportive environment is essential for enhancing their experience and improving retention.
- ❖ Technology can be leveraged to strengthen human connections, making interactions more meaningful and productive. By utilizing technology effectively, we can create an environment that supports both productivity and positive human interactions.

Putting Employees at the Heart of the Experience

Tanya Chowdhury, Global Industry Strategy Manager, Adobe

- ❖ Organizations understand that employees need tools and data to do their jobs well. The best way to do this is meeting employees where they are, ensuring they are happy and motivated by the mission. This includes considering their experience during onboarding and recruitment.
  - o The entire first year of onboarding at Adobe is dedicated to training and providing opportunities for new employees.
- ❖ Internet portals are excellent for maintaining the organization to employee connection. The site experience is being revamped to be more user-centric, with A/B testing and pilots across the organization for continuous improvement. Proactively listening to employees through qualitative and quantitative data is a key focus.
- ❖ Investing in resources focused on employee experience is critical, and communicating this investment to employees shows that the organization is dedicated to their success. More chief employee experience officers are needed to scale initiatives across the organization and proactively engage employees at moments that matter.
- ❖ Adobe partnered with Department of Defense (DoD) for personalized trainings, recruitment, and onboarding. Through this program, they were able to assess whether people are successfully completing their training and, if not, identify the reasons why.
- ❖ Being able to meet employees at moments that matter, such as during onboarding and recruitment, is crucial. Onboarding can be cumbersome when done on paper, but digitization alleviates this burden from employees.
- ❖ With a high rate of retirement in the public sector due to an aging workforce, digitization also aids in recruiting younger people.
- ❖ Using data from surveys and combining it with qualitative data yields the best results. A personalized intranet tailored to individual roles can leverage this data to determine if people are getting what they need.

Steven Boberski, Public Sector Chief Technology Officer, Genesys

- ❖ Improving employee experience is crucial for retention. A remote environment allows hiring from anywhere at any time, making the workforce more representative of the population.
- ❖ Empathy as a service involves noticing when a person is repeatedly going through processes or becoming frustrated. Addressing these issues can significantly improve overall outcomes, including better retention rates and shorter call times.
- ❖ The introduction of new technology, such as Generative AI, can make employees fearful for their jobs. However, if approached properly, employees will understand that AI is designed to make their lives easier, not replace them.

Kimberly Patrick, Principal Deputy Assistant Administrator for Mission Support, Environmental Protection Agency

- ❖ The Environmental Protection Agency (EPA) has a retention rate of around 80%, which is very high. They attribute this to their employee initiatives, such as their mindfulness campaign, encouraging employees to stop and breathe for 15 minutes. They have also made improvements to the LMS site to make it more user-friendly, which in turn has simplified tasks and lead to higher employee satisfaction.
- ❖ Employee feedback is collected through surveys, fireside chats, and town halls to continually improve their experience. This data is leveraged in practical ways, such as personalizing the intranet based on employees' locations and roles. This helps determine how well employees are resonating with the company and whether they are getting what they need for their careers.
- ❖ If an organization cares for its employees, they will care back. Employee experience begins at recruitment and continues through to retirement. Exit interviews are essential for understanding what the employee's experience was like throughout their tenure. A positive employee experience includes opportunities for career development and training, a good level of work-life integration, and that employees had the necessary tools and data to perform their jobs effectively. Additionally, employees should feel confident that their organization will support them when things go wrong.
- ❖ Understanding the training taken by employees and using data to evaluate the effectiveness of these trainings is crucial. This allows organizations to determine which trainings are successful and which may need improvement.

Shannon Wheeler Roberts, Communications & Innovation Program Manager, USCIS

- ❖ The shift from a mission-driven organization to one that prioritizes both mission and employee experience involves using employee data for improvements. Although there was initial resistance, leadership eventually saw the value.
- ❖ To enhance the employee experience, it's crucial to understand how employees are experiencing every aspect of their work. This includes their interactions with technology and their comfort in remote environments.
- ❖ Retaining talent in critical positions is essential, as it directly affects the security of the nation.

- The U.S. Citizenship and Immigration Services (USCIS) has focused on collecting surveys and conducting qualitative research to understand employee experiences. These efforts involve anonymous and voluntary participation. The feedback includes both positive and negative aspects. Employees are eager to improve their experiences, and USCIS uses this data to create opportunities for enhancing the employee experience.
- The organization is also working toward a culture change, although this process is inherently slow. Transforming the organizational culture takes time, but it is a crucial step in ensuring long-term improvements in employee satisfaction and engagement.

Peter Gorman, Senior Product Manager, MySBA Initiative, Small Business Administration

- An employee-centric approach includes an action planning committee to address observed issues and provide tools for employees to solve their own problems. Annual training assessments help track who is taking the training and when, offering numerous opportunities for employee development. Pilots that do not go well are not considered failures; they still provide valuable learning experiences, and successful pilots should be implemented.
- When agency processes are bad, it negatively impacts the employee experience, which in turn affects the customer experience. This cascading effect shows the importance of efficient and effective internal processes.
- The Small Business Administration (SBA) fosters a culture of evidence and evaluation. Their initiatives actively seek feedback and use data to identify opportunities for improvement. This data is then reviewed by a committee dedicated to finding solutions. However, there is a desire to incorporate more qualitative data into these evaluations to gain a fuller understanding of employee experiences.
- The committee's role is to develop solutions and focus on empowering employees with the tools they need to solve problems themselves. This approach aims to enhance both the employee and customer experience by fostering a proactive and capable workforce.

Securing User Satisfaction

Kimberly Baldwin Sparks, Customer Experience Officer, Social Security Administration

- The SSA is integrating cybersecurity and customer experience (CX) together, focusing on transitioning to secure methods of ID authentication. They aim to make this transition successful and easy, while meeting customer expectations. The agency works closely with the CIO's office, which oversees the process to prioritize customer considerations.
- The Office of Transformation, with seven CX employees, maintains good relationships with other offices in the building. This assists with collaborations and allows or customer experience to be a consideration on every initiative.
- Accessibility is a major focus as the SSA provides crucial services to many people. A CX journey analysis revealed that the disability process was not user-friendly for people with disabilities, so

efforts are being made to make the process friendly from the start. There is also a push to reduce decision-making time.

❖ A deep dive into customer pain points highlighted communication issues, as the agency's communication sometimes left customers uncertain about their status. Communication method changes depending on the use case, for example, people preferred a paper letter in cases of approval notices and texts for appointment confirmations. The main method of communication was texting and email, which will be prioritized accordingly.

❖ To help customers protect themselves from scams and fraud, SSA conducts learning sessions, teaching them how to avoid these risks. As the agency explores digital options, they are aware of potential vulnerabilities when it comes to scams.

❖ Measuring customer data includes assessing trust and customer satisfaction. SSA has a good reputation for being a friendly agency and generally has a high customer satisfaction rate.

Pam Van Meter, Principal CIAM Specialist, Okta

❖ Okta provides tools for serving external users, with a focus on identity proofing and an online experience. They aim to create a secure, easy, and flexible way to interact with the agency. States are moving towards a citizen portal for all applications, reducing friction and increasing public awareness.

❖ Using AI and ML for risk detection and security improves security and reduces the need for interventions like CAPTCHAs, resulting in less work for humans. Password less logins are both more user-friendly and secure.

Data Driven Decision Making

Savanrith Kong, Senior Advisor, UX Portfolio Management Office, Office of the Deputy CIO for Information Enterprise, Department of Defense

❖ The Department of Defense (DoD) considers its customers to be the entire department, with the CIO office playing a pivotal role in strategy and oversight for collaboration. While there have been pockets of success in customer experience (CX), there is a growing positive momentum across the organization to establish a cohesive approach.

❖ Currently, the metrics used to gauge success in CX are basic, but they provide a solid starting point. The establishment of a Chief Experience Officer (CXO) marks the beginning of this journey, and the approach will evolve over time, iteratively incorporating feedback from customers.

❖ The DoD recognized the importance of relying on metrics and encourages a fearless approach to learning from the information gathered. This data should be used to guide decisions, helping to refine and improve the overall CX strategy continuously.

Bob Ainsbury, Chief Product Officer, Granicus

❖ Granicus is in the business of building solutions designed for interaction with citizens, both at the federal and state levels. Building effective tools involves leveraging data about operations and the full journey of service delivery. Data is used to create a seamless end-to-end process. It's not just about completing tasks like grant applications but about ensuring the grants are awarded. It's essential to examine how services are provided, whether online or in person. The usage of a service indicates its value, and it's important to consider how much support was provided by looking at support data. Using the data you have can drive initiatives to gather even more data.

❖ One of the main challenges is data silos, where valuable information is locked away difficult to access. Data needs to be fused together to create comprehensive experiences. Data warehouses are a solution to this challenge, as they act as central repositories and offer a secure option for data storage and accessibility.

❖ Granicus consultants work with various agencies often find that there is a surprising lack of data, creating a data desert, where one would expect an abundance of information. This shortage of data hampers the ability to make informed decisions and improve services.

❖ Collaboration with Medicare and the health insurance marketplace has been successful in efforts to personalize interactions through the Centers for Medicare & Medicaid Services (CMS). This partnership aims to enhance the personalization and effectiveness of health services provided to citizens.

❖ Granicus software helps place veterans in employment by identifying who they are and their skills. It understands businesses and makes the necessary connections, resulting in a 127% improvement in the number of connections.

🧩 Strategies for Equity and Resilience on Government

Andrew Drummond, Director of Accessibility, Maryland Department of Information Technology

❖ The first strategy focuses on governance, emphasizing the need for policies and standards that facilitate cooperation between agencies. It's crucial to secure buy-in from leaders, including the governor and other executives, to achieve commitment across the board.

❖ One of Maryland's top initiatives was a statewide testing platform. It acts as a baseline tool for assessing accessibility of services. Efforts to achieve compliance have been transparent and are creating trust between the government and citizens. The Department of Information Technology is overhauling state submission templates to ensure they are accessible from the outset.

❖ Each agency is required to designate one team member to attend accessibility training sessions, where they learn about compliance requirements and bring back expertise to their teams. This approach makes sure that agencies do not rely solely on vendors to resolve accessibility issues but can manage and address them independently. Governance plays a critical role in creating

consistency and repeatability across agencies, preventing each from independently seeking vendor solutions and promoting a unified approach to compliance.

Dr. Jonathan Lazar, Executive Director, Maryland Initiative for Digital Accessibility (MIDA)

❖ MIDA established working groups focused on sectors such as K-12 education, working professionals, higher education, and different demographic groups. These groups encourage individuals to share their passions and interests, helping them connect with others who share similar goals and facilitating their involvement. Discussions within these groups explore different aspects of digital accessibility, aiming to empower people to pursue their passions effectively.

❖ A key principle is always planning ahead to enhance accessibility. This includes implementing remediation solutions where necessary to ensure that digital resources and platforms are accessible to all users.

❖ Efforts are underway to initiate collaborations with other universities, sharing knowledge on building infrastructure that supports accessibility standards. This exchange of expertise aims to promote widespread adoption of accessible design practices within educational and institutional settings.

❖ Technical expertise is crucial in achieving accessible design. Discussions and initiatives focus on understanding and implementing accessible design principles at a technical level, ensuring that digital interfaces and technologies are inclusive and user-friendly for everyone.

Investing in Trust

Kevin Hoffman, Director of Design, Office of the CTO, Department of Veterans Affairs

❖ The customers of the VA organization are our employees, totaling 4,000, and veterans. The department prioritizes putting the customer first to ensure our employees are trained on how to treat them respectfully and effectively.

❖ Most of our customers interact with the VA online, which requires the VA to continuously develop ways to measure and enhance digital products and services.

❖ As a High Impact Service Provider (HISP) service provider, the VA contributed to the M-23-22 IDEA Act memo, which emphasized the importance of prioritizing customer needs and experiences.

❖ The goal is to create a seamless customer experience where customers do not have to think about interacting with different parts of the agency separately. Instead, they should have one cohesive experience without multiple sites and logins.

❖ The VA faces challenges with budget constraints in both development and sustaining services, which affects our ability to innovate and improve continuously.

❖ To monitor our customer interactions effectively, the VA implemented a dashboard that tracks all customer interactions and satisfaction rates comprehensively.

❖ The VA conduct tests with customers to ensure that the language used on our forms is user-friendly and easily understandable.

❖ Ideally, the goal is to minimize the need for customers to fill out forms altogether. For veterans, once they have served in the military, the government should already have all the necessary data. Veterans should only need to prove their identity to receive the benefits they qualify for.

Jessie Posilkin, Customer Experience Portfolio Lead, Technology Modernization Fund

❖ Improving the delivery of services is a primary objective, aiming to enhance efficiency and effectiveness in serving the public. Investing in internal services is critical to supporting these improvements, ensuring that the agency operates smoothly and can meet the needs of its stakeholders effectively.

❖ At the Bureau of Land Management (BLM), investments are being made to overhaul operations, which impacts how the public interacts with and perceives the agency. By streamlining internal processes and reducing labor-intensive tasks, these efforts aim to improve customer experience and external interactions, enhancing overall satisfaction and service delivery.

❖ Upgrading infrastructure, particularly backend systems, is recognized as essential for supporting modern operations and maintaining data integrity. The backend infrastructure plays a crucial role in facilitating smooth operations and enabling efficient service delivery to the public.

❖ Things like lengthy wait times and mysterious government processes created a sense of uncertainty among citizens, and therefore acts as a barrier to improving public trust. This highlights the urgency of modernizing legacy systems to increase transparency, streamline operations, and restore public confidence in governmental processes and services.

Michael "MJ" Jackson, Vice President & Global Head of Industries, Docusign

❖ In government, services are significant as they coincide with crucial life moments such as retirement, disaster recovery, transitioning from military to civilian life, overcoming economic challenges post-childbirth, and managing sudden financial losses. Understanding these journeys allows Docusign to prioritize and improve services that impact people's lives during these critical times. This includes identifying the most frequently used forms and prioritizing their digitization to enhance accessibility and efficiency.

❖ The shift towards digital interactions is evident, with more than a third of e-signatures now occurring via mobile phones.

❖ For all services to be accessible they must be based on individual needs, which necessitates robust archiving and storage solutions to manage digital records effectively.

❖ Identifying areas where services fall short is crucial. Whether it's due to language barriers, preferences for phone wait times, or other factors, recognizing and addressing these issues is essential for improving customer satisfaction. Bringing failures to light is viewed positively, as it allows us to iterate quickly, resolve issues promptly, and ultimately enhance service delivery. Embracing a culture of failing fast and making rapid improvements ensures that we continually evolve to meet the needs and expectations of the public effectively.

Maximizing Customer Experience through Shared Insights

Joshua Lehman, Chief Customer Experience Officer, U.S Food and Drug Administration

- ❖ The Food and Drug Administration (FDA) is focused on creating a more formal strategy, structured around three core pillars: creating trust, delivering an optimal experience, and fostering empathy. These elements are essential for building a strong, reliable connection with stakeholders and ensuring that our services meet their needs effectively.
- ❖ Creating trust involves transparent and consistent communication. Delivering an optimal experience requires us to streamline our processes and interactions, making them as efficient and user-friendly as possible. Fostering empathy means understanding and addressing the unique needs and concerns of our users, creating a more personalized and compassionate service experience.
- ❖ Having a robust feedback mechanism is crucial to this strategy. It allows the FDA to gather insights directly from our users, revealing gaps and areas for improvement that we might otherwise overlook. The feedback we receive is invaluable for refining our services and ensuring they are truly responsive to user needs.
- ❖ The end product of this approach is actionable data. By utilizing a single tool to collect and analyze this data, we establish a single source of truth. This unified perspective enables us to make informed decisions and implement improvements consistently across all areas of our service delivery.

Beth Martin, Digital Services Expert, Office of Personnel Management

- ❖ The Office of Personnel Management (OPM) is focused on making the OPM website more user-friendly for individuals seeking federal employment and those preparing for retirement. Providing the necessary tools and support allows the agency to streamline these processes.
- ❖ Customer experience involves understanding and serving users' needs, and OPM is committed to managing that journey effectively. OPM has embraced its role as a digital services agency and understands importance of understanding and empathy in designing systems centered around human users.
- ❖ When systems are not intentionally designed end-to-end, problems arise, and trust breaks down. For example, if someone submits a form and doesn't receive timely feedback or updates, they feel neglected and lose trust in the system.
- ❖ OPM continuously evaluates whether their efforts duplicate existing services, which is a challenge for large and complex agencies.
- ❖ The agency is evolving with the workforce, and implemented proactive training programs that keep our approach forward-thinking and relevant.
- ❖ People's expectations for digital services from the federal government are high, often comparing them to the seamless experiences provided by companies like Amazon. A poorly designed website can evoke negative feelings, emphasizing the need for excellence in our digital services. Legislation provides guidance to support these efforts.

❖ Looking to the future, OMPs goal is to partner with other agencies to further dismantle information silos. Collaboration will enhance the flow of information and improve overall service delivery, ensuring a more connected and efficient government experience for all users.

Brian Mikkelsen, Vice President and General Manager, U.S. Public Sector, Datadog

❖ Understanding the state of internal systems is crucial to improving customer experience. It's essential to have a clear picture of how these systems operate to identify areas that need enhancement and to ensure they are aligned with user needs.

❖ Third-party tools play a significant role in this process. They have the capability to provide valuable insights into what is important for CX. For instance, heat maps can show the traffic patterns on our website, highlighting which buttons and features are frequently used. This information helps us understand user behavior and preferences, allowing us to make data-driven decisions to improve the user experience.

❖ The experience Data Dog provides evolves over time. It's never perfect at the start, and the companies must continuously adapt to changing expectations. As user needs and technological landscapes shift, strategies and plans must also adapt. A seven-year roadmap, while useful, is not static and will require adjustments as we learn and grow. By staying flexible and responsive, we can rise to meet new challenges and opportunities, ensuring that our services remain relevant and effective.

Closing Keynote

John Boerstler, Chief Veterans Experience Officer, Department of Veterans Affairs

❖ There are 185 different CX surveys conducted for veterans. These surveys cover every type of service and evaluate aspects such as trust, ease of use, effectiveness, and emotion. The feedback gathered has led to an increase in satisfaction rates, from 85% to 92%. Measuring these metrics over time enhances awareness and helps identify areas for improvement. Additionally, the data collected is used to train employees to deliver a world-class experience, demonstrating that investing in employees leads to higher CX outcomes.

❖ The VA is also designing a mobile app and other digital tools to further enhance the customer experience. These digital solutions aim to provide easier access to services and improve overall satisfaction.

❖ The Departments efforts in improving the employee experience has shown significant results. The VA has moved from 17th to 5th place in the ranking of the best places to work. This improvement highlights the positive impact of the initiatives on employee morale and satisfaction.

❖ State governments require numerous solutions for improving customer experience. They often need assistance in implementing effective strategies. One crucial step is mapping out the customer and employee journeys. This process helps identify pain points, particularly in areas

such as onboarding, and allows for targeted improvements that enhance the overall experience for both customers and employees.

Appendix

June 6th, 2024

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