Customer Experience Summit 2025

Key Takeaways

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Government Customer Experience & Engagement Summit

Building the Future of Government with Technology, Efficiency, and a Culture of Excellence

The Westin Washington, DC Downtown

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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.

🤝 Opening Keynote

Constance Sayers, President, GovExec

- ❖ Citizens now expect fast, seamless, and personalized services, similar to those provided by the private sector. This rising expectation is occurring in a time that trust in public institutions is eroding, making it critical for governments to demonstrate responsiveness and transparency.
- ❖ By empowering public servants and leveraging modern tools, governments can deliver more efficient and user-centric experiences. Collaboration between skilled personnel and smart technologies ensures services are faster, more reliable, and inclusive.
- ❖ Advanced analytics, AI, and cloud computing enable real-time decision-making and proactive service delivery. Breaking down data silos and adopting interoperable systems helps unlock insights that drive better outcomes for citizens.
- ❖ Services should be inclusive, meeting the diverse needs of all users regardless of ability, location, or background. Ensuring digital access and usability fosters equity and reinforces public confidence in government systems.

Brian Chidester, Head of Global Strategy and Innovation, Adobe

- ❖ Citizens and users now judge government services based on the same standards as top-tier private companies. A poor experience can lead to dissatisfaction, reduced engagement, and further erosion of trust in public institutions.
- ❖ CX isn't just about satisfaction—it directly impacts operational efficiency, cost savings, and service effectiveness. When designed well, great customer experience reduces duplication, minimizes support needs, and improve system interoperability across agencies.

Sonny Hashimi, Former Commissioner, Federal Acquisition Service, GSA

- ❖ Operational goals like reducing call volumes or wait times can be directly addressed by improving CX. Embedding CX into the core of operations ensures services are designed around user needs, not internal processes—where good design feels seamless, even invisible.
- ❖ Effective CX begins with understanding the "why"—what issue are we solving, and for whom? For instance, if small businesses face delays due to slow document uploads, the solution might be a technical upgrade or a policy change, but either way, it stems from human-centered insights.
- ❖ Processes cannot be improved without being measured —define clear goals (e.g., reduce a 44-day process by 30%) and track progress. CX efforts should be grounded in outcomes, with success measured not only in efficiency but in how well they meet real user needs.
- ❖ True efficiency gains happen when CX is used to streamline processes and reduce friction. Leveraging technologies like AI can transform interactions, automate repetitive tasks, and minimize the need for human intervention—unlocking both scale and better service delivery.

Maria Roat, Former DCIO, The White House

- ❖ CX isn't a one-time initiative—it must be a mindset across teams and departments. Having the right people with the right skills is essential to improving outcomes for users and building a culture of continuous improvement.
- ❖ Teams should have a clear grasp of the desired end state and the steps required to get there, including policy constraints and operational hurdles. It's important to be realistic—acknowledge what's achievable and avoid overpromising on massive projects with tight timelines.
- ❖ If leaders can't clearly state the problem in a single sentence, the mission is likely to drift. Program leads should ask "why not?" when something seems blocked, and will often uncover outdated policies or misaligned priorities that can be fixed.
- ❖ Focus on removing small barriers early to lay the groundwork for bigger progress when budget or opportunity arises. Patience, preparation, and realistic planning are key to long-term CX success.

⚕ Leveraging Automation and Analytics to Enhance Customer Experience

Manny Medrano, Director Office of Cyber Monitoring and Operations, Bureau of Diplomatic Security, Department of State

- ❖ Organizations often have an abundance of data but struggle to connect it to meaningful outcomes. The focus must shift to asking: *How is this improving our operations? Are we delivering on our mission?* Dashboards and analytics should drive action—not just display numbers.
- ❖ Success comes from curiosity—teams need to ask the right questions that lead to process improvements and anticipate issues before they occur. This mindset shift can be difficult, but it's essential to align day-to-day work with organizational goals. An example is streamlining from seven logins to one—real operational efficiency. Tools and dashboards must be intuitive and supported by plain language, so users at all levels can understand and act on the information provided.
- ❖ AI and modern CX systems require skilled, trained staff to deliver real value. Organizations must invest in training, ensure the right talent is in place, and clearly articulate the mission so teams understand the purpose behind their work.

Angy Peterson, VP for Experience Services, Granicus

- ❖ It's not just about collecting data like time spent on a site—it's about understanding what that engagement means. Is the user confused, or are they finding value? Metrics must link to outcomes, such as increased satisfaction, successful completion of tasks, or reduced support needs.

❖ In the case of VA transition services, the redesigned experience provided structured, deadline-based guidance that helped users feel supported through a complex process. This approach led to measurable improvements in satisfaction and confidence.

❖ When users show interest in a topic, proactively providing relevant follow-up content or updates strengthens engagement. Targeted, timely communication creates a sense of care and reinforces a two-way relationship with the agency.

❖ Integrating data from multiple agencies and platforms allows teams to see where users drop off—such as during enrollment applications—and why. Secure, role-based access ensures that data is protected while still actionable for those who need it.

❖ Dashboards and metrics should not exist in isolation—they need to reflect what you're trying to achieve and why. Conducting thoughtful analysis turns raw data into strategic insights that can guide program improvements.

❖ Successful implementation starts by mapping the workflow and user journey—only then should technology be layered in. Tools are most effective when built to serve clear needs, not when retrofitted to unclear or broken processes.

❖ When users submit applications or requests, confirming receipt and providing updates reduces anxiety and builds credibility. This basic communication step is often overlooked, but it plays a major role in user satisfaction and trust.

❖ Viewing users through a combined lens—understanding their behaviors, pain points, and stage in the journey—creates a more cohesive and responsive experience. This intersection is where real transformation occurs.

Don Bauer, Former Chief Technology Officer

❖ Automation is eliminating manual touchpoints, enabling faster, more accurate service delivery. For example, HR systems were corrected through automation, leading to real-world impact—in this case new employees getting health insurance on Day One.

❖ Analytics, when paired with automation, provides insight into performance and enables predictive actions rather than reactive fixes. This shift leads to streamlined operations and greater responsiveness to user needs.

❖ Leadership often expects quick insights—but analytics must move beyond surface-level metrics to capture true customer experience (CX). For instance, email surveys tend to trigger feedback from dissatisfied users only—analytics must evolve to capture a broader emotional and behavioral picture.

❖ CX-focused analytics should uncover whether users are actually enjoying the experience, not just completing tasks. Measuring sentiment, friction points, and completion rates gives a more holistic view of success.

❖ Poor data quality—especially in HR—is a major barrier to effective analytics. Cleaning and validating data are often overlooked in the rush to implement new tools, but it's essential for reliable insights.

❖ Correcting data issues through automation improves both accuracy and trust in the system. Clean, accurate data enables dashboards to reflect true performance and support smarter decisions.

❖ Leadership wants visibility into how fast and how well things are getting done. Systems should track time spent at each step in a process—revealing bottlenecks, training gaps, or other issues that affect throughput.

❖ Help desk data is a goldmine for insight—spikes in ticket volume or recurring complaint themes point to systemic problems. This operational intelligence should feed directly into CX improvement plans.

❖ HR projects often fail due to a lack of trust and transparency—having a support team available in real-time can ease uncertainty. Building responsive help desk teams and analyzing common questions also helps improve documentation and user education.

❖ Support channels should be integrated with analytics to identify pain points and refine both technology and processes.

❖ The same data can generate countless dashboards—but the value comes from asking the right questions. Dashboards should be built to reflect key business goals, user experiences, and system performance—not just display vanity metrics.

❖ Effective dashboards are actionable, showing where issues exist and what can be done about them.

☁ Cloud-Powered Customer Experience

Sanjay Koyani, Former Executive Director of IT Operations and Services, Department of Labor

❖ Users want services that adapt to them—not the other way around. They expect speed, ease, and relevance, driven by experiences in the private sector. Government services must meet these expectations as a baseline, not as an afterthought.

❖ There's a risk that leadership treats user experience (UX) as supplemental rather than essential. Prioritizing UX from the start is key to trust, efficiency, and satisfaction—not something to bolt on later.

❖ The Department of Labor's cloud migration was driven by the need for faster, cheaper, more modern IT services. Leveraging modernization funding, shared services, and scalable infrastructure has helped keep IT costs flat—even during inflation.

❖ Cloud enables integration, automation, and smarter use of data. With AI capabilities now embedded in cloud provider tools, agencies can automate more functions, improve performance, and reduce operational overhead.

❖ Agencies manage hundreds of legacy applications—full-scale transformation isn't always feasible or funded. Instead of replacing everything, agencies should prioritize incremental modernization, enabling old and new systems to coexist where appropriate.

- The key question is: *What level of change delivers value without unnecessary cost or risk?* Not every system needs a total rebuild—some need rethinking, some need automating, and some just need better integration.
- Modernization efforts must align with both user needs and regulatory compliance. Agencies must work with vendors who understand the mission and can help eliminate real user barriers—not just sell technology.
- Agile acquisition models are needed in government to allow for testing, iteration, and faster deployment. "Test before launch" should be a standard, not a luxury, enabling feedback-driven development that works for end users.
- Once services are modernized, agencies must communicate those changes in a user-friendly way. Clear messaging helps users understand what's different, how to use the new system, and what value it brings—essential for adoption and trust.
- Generative AI and cloud-based tools offer users quicker answers and smoother experiences. However, their use must be governed by transparency, responsibility, and security—especially in sensitive public-sector environments.
- Agencies should balance innovation with ethical implementation, ensuring tools support—not undermine—user trust and agency credibility.

Kaitlin Klaum, Senior Team Manager, Box

- Constituent services must be fast, affordable, and simple—doing more with less is critical.
- Leveraging data insights and AI tools can enhance service delivery without adding complexity or burden to users.
- Security must be the starting point, especially when adopting AI and new technologies. Zero trust frameworks ensure information stays protected, forming the backbone of any modernization effort.
- Modernization is a journey—"crawl, walk, run" phases emphasize gradual adoption supported by strong partnerships.
- AI enables extraction and structuring of information from large, complex documents—turning months of work into minutes. This accelerates informed decision-making and unlocks new possibilities for efficiency and insight.
- Vendors are not just suppliers but collaborators, walking alongside agencies to solve problems and implement solutions.
- Strong partnerships help ensure AI and data initiatives align with agency goals and real-world challenges.
- While AI promises ease and efficiency, there are risks of misuse. Agencies must align AI strategies to prevent negative uses and ensure ethical, transparent, and accountable deployment.

Data Analytics: Turning Insights into Impact

Trang Tran, Deputy Chief Data Officer, Customer and Border Protection

- ❖ It's essential for customers and staff to understand where data comes from, its role, and how to use it effectively.
- ❖ Having a clear mission tied to data ensures reliability, efficiency, and effectiveness across the organization.
- ❖ Educating partners and staff on data's purpose and location is a core part of fostering a strong data culture.
- ❖ The data office, established a few years ago and growing rapidly, supports the organization in understanding data's strategic importance.
- ❖ Teams such as data working groups and analytics groups actively promote data use, with AI becoming an increasingly important focus.
- ❖ Interest in learning more about data and AI is growing across the organization, helping embed data-driven thinking.
- ❖ Understanding what data represents and ensuring the "right" data is collected is critical.
- ❖ It's vital to confirm that data used for analytics or AI models is appropriate, accurate, and relevant.
- ❖ Collaborative team efforts help build tools that make data actionable and useful for real-world decision-making.
- ❖ Sharing data across agencies like HHS and DOJ enhances efficiency and effectiveness.
- ❖ Public-private partnerships and shared data initiatives improve outcomes and deliver greater value to taxpayers.
- ❖ Strong governance frameworks for both data and AI are necessary to ensure ethical, secure, and compliant use.
- ❖ Working with professionals and experts in these areas supports responsible data management and AI deployment.

Dan Allen, Global Head, Customer Success Digital & Security Solutions, HP

- ❖ Whether in public or private sectors, the core purpose remains the same: serving customers and fulfilling the mission effectively. The central question is always: *How can I better accomplish my mission?*
- ❖ Success depends on everyone understanding and embracing the mission.
- ❖ Every role is vital and fostering a culture where all team members work toward a shared goal drives cohesion and impact.
- ❖ It's important to measure not just outputs, but the effectiveness of services and the customer experience delivered.
- ❖ These measurements guide the search for relevant data and inform how data can be used to improve outcomes.
- ❖ Having the right tools to analyze data is crucial for extracting meaningful insights.

❖ Staying current with the latest technologies ensures data can be effectively harnessed to support mission goals and drive continuous improvement.

Capt. Daniel Rogers, Chief Data and Artificial Intelligence Officer, U.S. Coast Guard

❖ Delivering a great customer experience requires more than technology—it also depends on training, intuitive systems, and clearly defined processes.

❖ Employees must have access to integrated tools and real-time data, with interfaces that are user-friendly, clickable, and enable them to act quickly.

❖ Systems should come with built-in guides, reference points, and contextual help so users don't have to guess how things work.

❖ An integrated data environment makes it easier to streamline decisions and avoid silos—data should work *with* the process, not just sit beside it.

❖ The most effective way to inspire change is to show people the value in what they already do—highlighting how data already flows through their work.

❖ Change management should feel familiar, not foreign—build on existing tools and insights to evolve behavior and improve systems.

❖ The people closest to customers and the data should help shape system improvements—they see the friction and opportunities firsthand.

❖ Focus on managed risk: What areas, if improved, would have the biggest organizational impact? What's worth fixing first?

❖ Don't begin by asking "What data do we have?" Start by asking "What outcome do we want?"

❖ Data is most powerful when used to solve real problems—its value lies in what it enables, not just in its existence

❖ Without a shared framework, information-sharing becomes chaotic: "I talked to this person, who sent me to someone else…"

❖ Enterprise-wide solutions eliminate redundancy and confusion, ensuring everyone is working from the same playbook and accessing consistent data.

🦠 Balancing Customer Experience with Cybersecurity

Steven Boberski, Public Sector Chief Technology Officer, Genesys

❖ Security isn't just technical—it impacts areas like hiring, operations, and how people interact with systems.

❖ Cybersecurity touches individuals, not just infrastructure, and must be approached as both a cultural and technical priority.

❖ Security strategies are shaped by customer expectations and compliance needs; protecting their mission is part of supporting their success.

❖ Balancing CX with compliance ensures systems are both safe and usable.

- Organizations need a clear security framework—and must weigh the opportunity cost of inaction. Ask: *If we don't do this, who will do it better? Who will outpace us?* This perspective drives urgency and investment.
- Security tools must be simple, intuitive, and embedded into existing systems.
- If it's not easy to use, it won't be used—usability is a prerequisite for security adoption.
- Being transparent about how data is protected builds credibility and public trust. Example: AI initiatives that disclose steps to reduce environmental impact demonstrate responsible innovation.
- Embracing modern tools (AI, automation, cloud) creates new security risks, but also opportunities to reinforce defenses.
- Tools like speech-to-text, call summaries, and smart recommendations enhance CX *and* security—reducing steps and encrypting data throughout its lifecycle.
- Great security design eliminates unnecessary steps, enables autofill, and ensures users only enter data once—enhancing both CX and protection.
- End-to-end encryption ensures security is embedded, not bolted on.
- Involve users early—show them what's being done to protect their data and improve their experience.
- Proactive transparency earns support and reduces resistance—people are more likely to trust systems they understand.

Densmore Bartly, CISO, U.S. House of Representatives

- Agencies may be bound by strict policies, but outside of that structure, organizations still need to make smart, secure choices.
- Cybersecurity and customer experience are not competing priorities—they reinforce each other. A *risk-based approach* is compatible with CX because both aim to protect and serve the end user.
- The ideal experience includes security, functionality, and usability—none should be sacrificed.
- Designing with all three in mind draws customers in and builds long-term trust. That's the core of a truly secure customer experience.
- You can't afford to implement *every* best practice—so focus on what matters most to your business and customers.
- Cyber risk should be tied to business priorities: what's the biggest threat to mission success? What matters most to stakeholders?
- The fewer manual touchpoints, the better the experience—and the more secure the process. Example: Adding a one-click button in email to report phishing led to more reports, with zero extra effort from users. Smart automation reduces friction and increases protection.
- When introducing new tech, it's critical to implement **customer-responsible controls** and communicate what's been secured.
- Users should *know* and *feel* that their experience is protected—this builds trust and adoption.

- Every new tech or security investment should be directly tied to a business problem or opportunity.
- Start with the business case → define the customer need → apply the tech → layer in risk mitigation. If that chain is broken, CX suffers.
- Teams need to deeply understand the user base and feel connected to improving their experience.
- Cybersecurity should be treated with the same level of empathy and focus as customer experience—both are essential to serving the business mission.

The Future of Government Customer Experience

Barbara C. Morton, Deputy Chief Veterans Experience Officer, Veterans Experience Office (VEO), Department of Veterans Affairs

- Serving veterans, survivors, and their families means *listening* to their voices and translating insights into actionable tools.
- The highest compliment from a constituent is: "I trust you." That trust is the reason many choose public service—and it must be earned continuously through responsive, human-centered delivery.
- The VA Customer Experience (CX) Office was established to embed CX thinking into everyday programs, services, and training. Its mission: Use data and insights to adapt to evolving needs while keeping the focus on *people*, not just processes.
- Veterans interact with multiple VA services (healthcare, benefits, etc.)—CX ensures users don't "fall between the seams."
- The CX team works across the agency to identify service gaps and implement cross-functional action plans.
- In a democracy, to serve is to listen. CX is not just a tool—it's foundational to government legitimacy.
- Human-centered design ensures that service design and delivery start with the lived experiences of real people.
- Technology should never replace human contact—but it can amplify human-centered service by improving speed and accuracy.
- AI helps the VA scale its services efficiently, ensuring the focus stays on the people it serves.
- Building a CX culture means finding a "coalition of the willing"—motivated, knowledgeable teams who believe in CX and can drive it across the agency.
- Transition points (e.g. new leadership) are prime moments to reinforce the value of CX and onboard others into the mission.
- CX is not just a feel-good initiative; it's a measurable indicator of how well an agency performs.
- Understanding the *KPIs for experience* helps ensure every policy, system, or tool is delivering value to the people it was meant to serve.

- Ask not only what's working, but what matters to the *culture* of the agency and the people it serves.
- Sustaining a CX mindset means aligning around values, trust, service, and constant learning.

Improving Government Customer Experience in Uncertain Times

Judy Weader, Principal Analyst, Forrester Research

- Change and uncertainty are *not new*—they are a constant reality. Rather than resisting it, government agencies should see change as an opportunity to adapt and lead.
- Federal customer experience (CX) saw notable improvements in 2021 but has since plateaued. It's time to reignite momentum.
- Citizens don't judge service by just their last experience—they measure government performance against private sector standards, social expectations, and cultural shifts.
- CX needs to evolve with the customer, not behind them.
- Agencies are modernizing customer management with tools like CRM platforms that notify users of complaint statuses—offering more transparency and self-service.
- International inspiration*:* Singapore's Singpass offers a unified sign-on across public services—84% of residents feel they're part of a global CX leader.
- Technology can accelerate CX transformation across digital, physical, and hybrid channels—but only if it's anchored to solving real problems. Ask: *What problem are we solving?* How will success be measured (e.g., time savings, task completion, satisfaction rates)?
- Trust in government is critically low: only 15% trust the government, and just 31% say they'd go beyond the bare minimum in complying.
- Strong CX can help "flip the script" by increasing participation, efficiency, and resilience.
- Don't buy tech just for the sake of modernizing. Buy when it solves a problem—and account for the recurring costs that come with it. Ask: *How might we do things differently?* Focus on what will truly support your people and missions.

Appendix

June 6th, 2025

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