Solving the customer-experience puzzle: A guidebook for government leaders

It takes focus to transform public-sector agencies to serve a diverse set of customers better. A ready reference—based on lessons from government leaders—can help.

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The spectrum of customers served by any government agency[1] presents a puzzle of personal profiles, each with needs that evolve during life journeys that span years, career changes, and shifting economic, social, and family circumstances. Across the public sector, leaders increasingly recognize the rationale for improving customer experience—enhanced ability to achieve agency missions, outperformance in meeting budget goals, and more engaged employees. Yet we find many government leaders stumbling as they address how to unearth poor customer experiences, improve them, and piece together a complete picture of their customers and the elements of a culture to sustain improvement over time.

Based on success stories both big and small, we have distilled a set of prescriptive steps to help agencies put people first and encourage the mind-sets, processes, and culture to support that goal. Taken together, these steps can guide agency leaders in addressing the following four essential activities in leading a customer-experience transformation amid the reality of public-sector structures, motivations, and constraints:

- Determining what matters

- Resetting citizen expectations, and innovating to realize them

- Cultivating a customer-centric culture

- Building and sustaining momentum

Determining what matters

Agencies lacking a clear understanding of what matters most to widely diverse customer populations risk wasting scarce time and resources on things that don't. The challenges in collecting and analyzing data range from information gaps to information overload to legal restrictions on data gathering. But certain approaches can help in launching a customer-experience transformation and tracking its progress.

Identify your customers and their journeys

Begin by clarifying who your customers are and what they are trying to do. Identify the different segments of your customer base and their journeys to understand what matters to them, and thus sharpen your focus. Send frontline, middle-management, and senior leaders into the field to make sure they see, hear, and feel the customers' reality. For example, in the wake of the public outcry over Hurricane Sandy claims processing, the Federal Emergency Management Agency (FEMA) undertook a series of "ride-alongs" with claim adjustors to observe firsthand how the damage-assessment process worked.

Analyze existing data in new ways

As you identify problems and set priorities to tackle them, start with the data you have. Consider what you already know about your customers that might not have been formally analyzed. Chances are you already have a wealth of information that just needs a creative application.

When the US Department of State reviewed data on cases requiring supplemental information for passport applications, one category stood out: children's passports, which require in-person or documented consent from both parents. Cross-referencing applicant addresses with census data revealed that a large share of applicants came from Spanish-speaking areas, suggesting that language barriers were perhaps the culprit. The passport team was then able to revise the application instructions with simpler language and now works on translating the forms into Spanish.

Draw new data from unexpected places

Look beyond surveys and individual customer interactions to understand the full range of factors affecting people's experiences. Tap employees who directly interact with customers and other service providers. For example, as part of a broad customer-experience effort, managers at one commercial airport talked to food-service personnel and other employees to learn more about what customers were experiencing. Similarly, the Transportation Security Administration (TSA) talked not only with air travelers but also with representatives from airlines and trade associations when it was

We, as government agencies, have to be resourceful. We don't have the same level of insight, research, or analytics that you'll find [in the private sector], but we have to do what we can with the information we have available to us.

Aileen Smith
US Department of State

kicking off its own customer-experience effort. Rather than simply conducting a survey later, TSA representatives approached passengers passing through its checkpoints to inquire in person about their experiences.

Consider whether commercial data sets, social-media information, or other publicly available data can fill the gaps and provide useful insights (when permitted by applicable laws and regulations). These data can be especially useful when combined with an agency's existing internal data. The US Department of State, for example, uses Yelp reviews of third-party passport agencies to identify customer-experience issues and set priorities. One large airport has used social-media scraping[2] to track and respond to customer sentiment in real time. Its approach has included geofencing[3] a single gate to scan comments and perhaps identify opportunities to address unhappy customers immediately. Governments, fearful of being perceived as overly invasive, have historically shied away from personalized-data gathering. Yet such techniques are commonplace in the private sector and generate important value for all parties by allowing companies to identify and meet customer needs more effectively. The public sector has a similar opportunity to tap customer feedback via publicly available data sources.

Measure what matters, and make it visible

Tracking customer-experience performance over time allows organizations to celebrate changes that are improving satisfaction and outcomes while taking a fresh look at those that are not. Monitor both operational performance metrics and customer-reported satisfaction. One agency installed a TV screen in its call center that displays in real time a set of key metrics, such as the number of requests coming in, response time, and customer-satisfaction rates. The team also regularly checks in with customers via surveys embedded in customer-transaction touchpoints and conducts annual interviews that focus on the elements that drive customer satisfaction. The organization can thus continually take the pulse of its customer-experience effort by tracking outcomes, satisfaction, and overall success at meeting customers' needs.

Integrate the metrics you have in hand into your operating model to drive real-time awareness and improved performance. The US Citizenship and Immigration Service (USCIS), for example, collects

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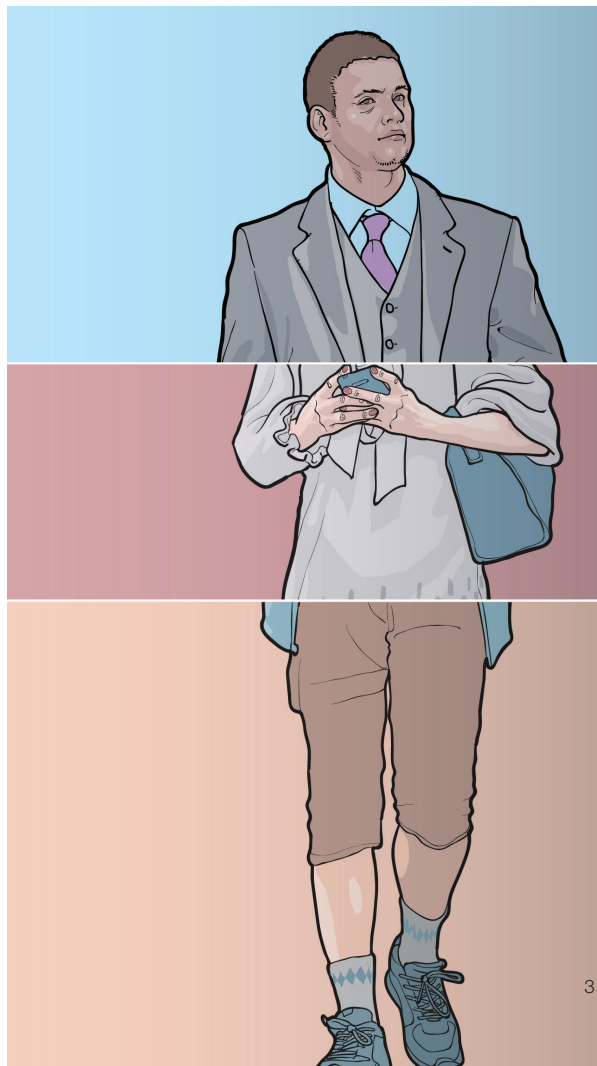
customer feedback and embeds it into daily huddles, employee coaching, and regular problem solving. Conveying progress into all layers of the organization helps employees improve their understanding of what matters to citizens and encourages them to take action where it matters.

Resetting citizen expectations, and innovating to realize them

Ultimately, customer satisfaction depends on two things: reality and expectations. Maximizing satisfaction requires both resetting the expectations and improving the reality. To redesign customer journeys, it is necessary to understand what your customers need and what your organization is capable of. Then you can communicate realistic expectations of what you can deliver to customers and continue to improve what you can deliver.

Know your breakpoints

Determine what "moves the needle" for customers. We all know that waiting in line is an unpleasant experience, but how long is too long before customer satisfaction begins to dip? We call such thresholds "breakpoints." Understanding where they exist is important to increasing satisfaction. Equally important, however, is understanding the points where delivered services reach diminishing returns. In other words, how much would satisfaction improve if each customer waited five minutes less, and how much would it cost to do so? Understanding your breakpoints and their relationship to value will guide how much time, human capital, and financial resources to invest in improvements.

For example, one airport used a breakpoint analysis to identify that traveler satisfaction declines rapidly when security wait times exceed about 20 minutes. But the analysis also showed that to increase customer satisfaction, wait times would have to average less than ten minutes. The customer-experience–improvement team, facing this strategic issue, decided to focus elsewhere—in particular, on how customers interacted with security officers. The reasoning? About 90 percent

of customers were clearing the queue under the 20-minute satisfaction breakpoint, and reducing the times below ten minutes would be a massive, expensive undertaking. But without understanding satisfaction breakpoints, it would have been easy to invest misguidedly in a reconfiguration of the security checkpoint or increase of staffing levels with little or no benefit to actual satisfaction. Instead, focusing on officer interaction boosted satisfaction with no effect on wait times.

Understand capabilities, and set expectations

Next, line up expectations for service levels with a realistic ability to deliver. Proactively managing customer expectations is one of the simplest, most powerful, and sometimes most cost-effective strategies agencies can deploy to improve customer experience. When many Internal Revenue Service

customers, for example, complained about what they perceived were delays in processing refunds, the agency simply changed its guidance. Instead of promising refunds based on the mean processing time, the IRS adjusted its communications to reflect the processing time required for most refunds: 21 days. It also created an online tool for customers to track progress. The number of complaints and inquiries fell almost immediately without changes to supporting business processes. This solution required a realistic view of what the agency could consistently deliver as well as an understanding of whether that would be reasonable to customers.

The greater the consequences of underperforming, the more conservatively you should set expectations. The same is true for greater variability or uncertainty in your ability to deliver consistently. Pleasantly surprising your customers by outperforming your own estimates—if they are reasonable in the first place—is also an opportunity to build goodwill.

Improve full journeys

As much as managing expectations can help, improving an organization's actual performance is the key to meeting and exceeding those expectations. To do so, agencies should think about journey redesign rather than process improvement—solving for what your customer is trying to accomplish rather than focusing on the individual steps along the way. For

I think we've been successful to some extent because we maintain a continuous effort to update and improve the site and our capabilities, but at the moment we are operating with some serious constraints. Soon, I anticipate a whole new way of operating that will help us deliver a new level of improved experience.

**Rick DeLappe**
National Park Service

example, suppose customers are frustrated that a multistep application's processing time takes too long. One impulse might be to think about reducing the time required for each step in the process. However, thinking of ways to reduce the number of approvals required to eliminate steps altogether might deliver greater impact. Perhaps you can segment customers up front and use a standard set of criteria applied in an automated process.

As part of its transformation effort, the online federal portal USA.gov created a journey-mapping tool to transform citizens' end-to-end experiences. The tool was based on an understanding of what customers were trying to accomplish, like applying for a job or finding hurricane-recovery resources. The agency redesigned journeys with these goals in mind, intentionally shaping the defining moments of each journey while paying attention to customer needs and emotive states throughout.

Top organizations take responsibility for their customers' entire journey, not just the portion under their agencies' direct control. People often don't or can't distinguish between interactions with government agents and those with external partners, making it critical to include the pieces delivered by other stakeholders when redesigning a journey. For example, the US Department of State found that the top reason passport applications were suspended was a problem with the applicant's photograph. These photographs were typically taken by independent vendors or one of 8,000 passport-application–acceptance facilities, such as post offices and libraries. To address the problem, the department worked with photograph vendors to improve photograph quality. Then it started offering in-house photograph services at overseas government-run passport offices, thus eliminating the need for outside vendors entirely. Finally, it equipped applicants with information about how to take better pictures through a #PicturePerfectPassport social-media campaign, enabling the customers to demand better service from nongovernmental photograph takers.
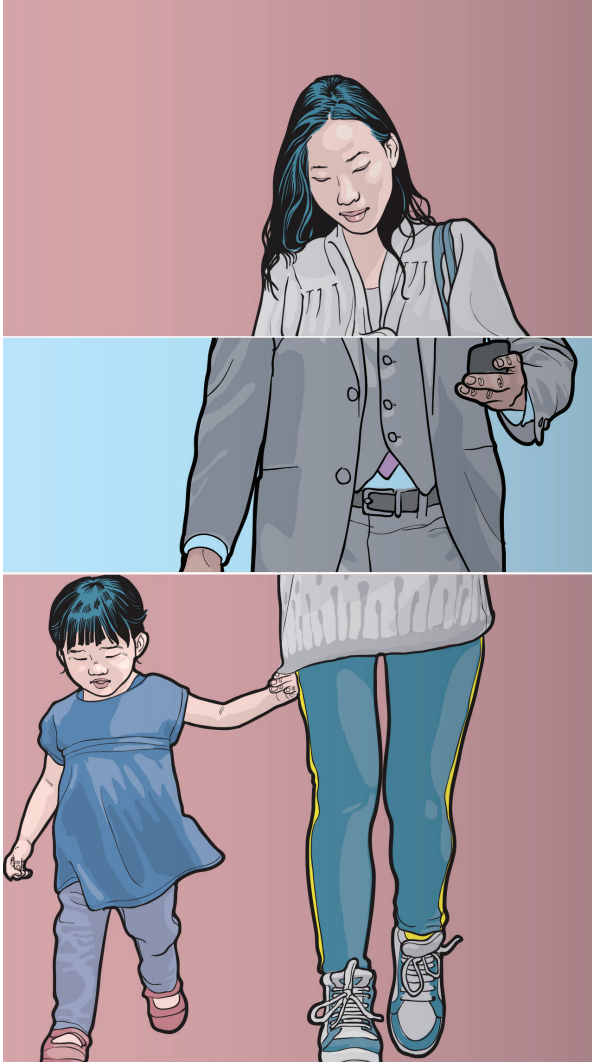
Thoughtfully experiment with digital and design

As you shift your perspective from process improvement to journey redesign, you will likely wonder about the role that technology and creativity should play. Effective organizations realize that digital technology and design thinking are part and parcel of consumers' lives and must be integral to solutions. At the same time, there are myriad discouraging stories of huge investments that don't pay off. Our guidance: approach digital improvements in bite-sized chunks. Make sure the decision is linked to an important element in customer satisfaction that is underperforming. Apply digital remedies where you are confident in your understanding of the root causes of dissatisfaction. Make sure a plan exists to migrate citizens onto the digital platform and that it includes integration on the back end. With digital approaches, if you feel like you are guessing, you might well be.

As an example, the National Park Service created a single portal, Recreation.gov, that combines relevant information from multiple similar agencies. Its flexible request-for-proposals process sought comment from users, hosted a "hackathon" to collect insights from its wealth of data quickly and inexpensively, and used customer feedback to test changes early and often. "We want to be actively engaging with the end user, collecting feedback, and then working in close proximity to execute and iterate on designs quickly," says Rick DeLappe, the portal's project manager. The agency expects the portal to support the evolving needs of customers seeking recreation and adventure through such programs as the Great Outdoors chatbot, which makes parks and recreation recommendations within an instant-messaging interface.

Cultivating a customer-centric culture

Learning to see through the eyes of frontline employees and aligning their behaviors, actions, and attitudes with customer needs can often be the most critical link in creating an enduring customer-experience program, especially in an environment of frequent administrative transitions. Nurturing a customer-centric culture can be a challenge, especially when employees are being asked to adopt a new perspective to their work. It is important to be deliberate in establishing organizational purpose, creating opportunities for employee engagement, adapting HR processes, and reinforcing desired behaviors. The result can make superior customer experience part of an institution's culture and secure its promise of sustained improvement.

Create a common purpose

Leaders looking to inspire a customer-centric culture are explicit and unrelenting in communicating and demonstrating the link between employee behavior and customer experience. Building that conviction often starts with a simple, crisp statement of intent based on a shared vision and aspiration. At the US Department of State's Bureau of Consular Affairs, for example, this shared purpose is reflected in the

rallying cry, "No missed trips!" Even a three-word statement can convey a genuine, easily understood goal that can help focus leadership and empower the front line around an objective important to customers. The slogan converts the task of fulfilling passport requests into a shared purpose of helping people arrive safely and quickly at their destinations.

Such a vision from the top is essential but insufficient by itself. To mount an effective customer-experience–improvement program, all employees (from management to the front line) must understand and support the vision. Every interaction between employees and senior leaders is a chance to showcase goals and priorities as well as celebrate employees who have gone the extra mile to help customers. Be clear and consistent in establishing this common purpose from the beginning. Repeatedly demonstrating alignment with existing organizational goals or, even better, usefulness in achieving the goals will help elucidate the common purpose to the front line.

Hire for attitude; train for customer experience
Here is an approach we have admired in the private sector and would love to see more in the public sector: employee mind-set as a formal hiring criterion. Some of the world's leading customer-experience organizations, like Disney, make a job candidate's attitude and personality something to recognize and celebrate. If the goal is to have happy, smiling people working with your customers, then hire happy, smiling people and train them for the necessary technical skills. It is often easier than the reverse. An energetic person excited about the agency's mission and opportunity to improve will likely be easier to coach and develop into a customer-experience leader than will someone lacking those traits.

Give employees a vehicle—and permission to take the wheel
Once the vision is established, share it through real employee engagement; go beyond simply asking

for input and changing performance metrics. One approach is to identify a specific problem—one that matters to customers and that leaders are committed to addressing—and ask employees to share ideas to help solve it. This way, employees don't assume their suggestions are getting lost in a box somewhere, but they are helping advance a strategic agenda. As part of a transformation effort, one airport identified a new and specific problem for employee input each week, created an online platform to submit ideas, and used that same platform to report updates on how the problems were being solved and the effect on customers. For frontline workers, the outreach, channeling of ideas, and follow-up feedback loop sent a message that their ideas mattered, which motivated them to engage even more deeply.

Leading agencies in customer experience go further by embracing organic, personalized, and sometimes unplanned activities that support a customer-centric culture. In the beginning of its own customer-experience transformation, one federal agency saw small, self-organized working groups pop up to work on problems that employees considered critical. At first, leaders were unsure if this would dilute the central effort or confound priorities, but they soon embraced the groups as the lifeblood of the transformation effort. When USCIS invited frontline employees to build out and test their own ideas, employees immediately felt more invested in the effort. Giving employees a platform and encouraging them to lead, whatever their job title, allows an organization to make the most of available resources while generating the energy, excitement, and passion needed for a truly transformative program.

Reinforce behaviors, not just outcomes
Recognition from senior leaders matters—as does acknowledgment from peers, which is often overlooked. Some agencies have found this acknowledgment even more effective than top-down encouragement at producing results. Why? Because

peers have visibility into the daily behaviors of employees, and reinforcing the behaviors required to deliver excellent customer experience is what builds capabilities and consistency over time. This approach results in greater collective improvement than does applauding outcomes alone, which is generally what senior leaders observe.

One airport created a system whereby employees could anonymously recognize peers who took actions aligned with customer-experience goals. The program boomed. Leaders noted that this system produced energy among employees as well as deepened and sustained their customer-centric culture to a degree that wouldn't have otherwise been possible. Some agencies, like the TSA, have chosen to integrate customer experience into performance plans. It is even better, if possible, to link both behaviors and outcomes to all sources of feedback, including that from peers, leaders, and customers.

Building and sustaining momentum

Starting on day one of an improvement effort, create an institutional structure to make focusing on customer experience a habit. Demonstrating actions and successes—however small—to customers and employees is essential for building momentum.

The agency needs to recreate itself as an entity that is agile and capable of change…. We made a lot of those little changes that built up our partners' trust and allowed us to develop the kinds of relationships we needed to … really help our partners make decisions.

Laura Furgione
National Weather Service

Put up quick wins

To build energy in your organization, dive right into fixing the obvious problems. When customer complaints, media reports, and legal challenges make the problems clear, there is no need to waste time collecting data to confirm what is already well known. Also, consider tackling smaller problems first to get tangible wins early. For example, users of the National Weather Service (NWS) felt the agency's all-caps messages seemed "like we were yelling at people," said former deputy director Laura Furgione in an interview last year. "We changed that, and we made the NWS consistent with other sources of information and how the public and our partners want to receive information. It seemed like a little thing, but it's showed that the NWS could actually make a change and come out of the dark ages."

As you kick off, clearly signal to employees the need for new ways of thinking and operating. In its customer-experience–improvement effort, FEMA officials used "design sprints"—a highly concentrated, rapid design and testing approach occurring within a few days to a week—to get quick answers and input from customers. They also used "gallery walks" to show what customers were experiencing and what needed to be solved. This approach highlighted pain points and opportunities, created conversation among employees, and indicated an intention to do business differently. These sessions were held in the main conference room on the main floor, where everyone could walk in and see and feel what needed changing and why.

Use the team and resources you have and build from there. The fact is, starting small is often the only option within the public sector's reality of constrained budgets, HR limitations, and barriers to establishing a new team or department. We have observed organizations begin transformations with only one or two dedicated people leading the charge, add staff through rotations or details, and use the success of those early customer-experience teams to justify adding resources for growth.
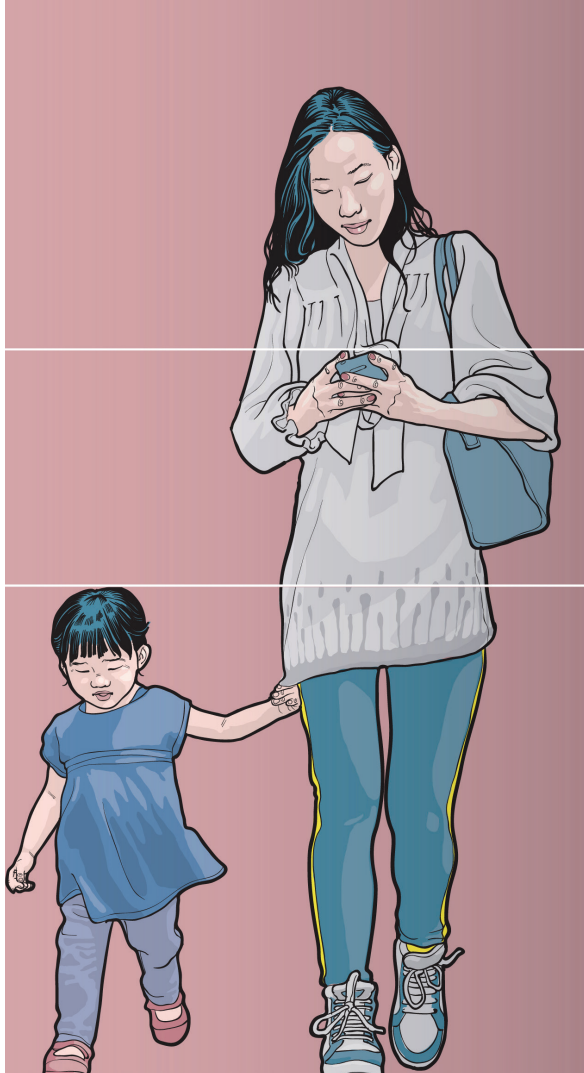
Meet on a standard rhythm

The internal and external infrastructures to sustain and track the progress of a customer-experience–improvement program need not be complex, but they must be consistent. As with all transformations, establishing a regular cadence of internal processes is critical. These structures provide an opportunity to refresh the program's vision, set project priorities, reinforce behaviors, identify problems, build employee engagement, and drive project-team action between meetings. USCIS implemented twice-weekly problem-solving sessions with project teams and senior leaders, a weekly all-hands meeting to share success stories, and daily huddles led by senior leaders. Such a system encourages decision making, prevents delays, and ensures consistency while holding project teams accountable for making real progress. The meeting structure is simple and won't do the job itself; the relentless focus on what matters, actions, and behaviors, and a commitment to trying new approaches are what make the difference.

Provide access to senior leaders

Embedding a customer-orientation in an agency cannot be a side project or siloed activity. It must be a shared aspiration within the organization. While small, dedicated customer-experience teams can help lead a transformation, they will need the leadership and decision-making authority of senior leaders to achieve the cross-functional collaboration necessary for success. In one federal agency, the chief operating officer decided to make customer experience a strategic priority. He established a Customer Experience Office headed by a senior executive as its chief officer. The executive was accountable for front-end processes, like applications and central processing, and held a senior-leadership role through the agency's operating committee that included strategic and budget-setting power. The chief customer-experience officer's formal authority and backing by senior leaders were critical in encouraging and empowering changes at the front line.

Keep a record to celebrate and cement progress

The rhythm of administration transitions poses a unique challenge to governments in maintaining program momentum. Leaders come and go, and new priorities cloud the institutional memory. You might need to revisit efforts to embed a common purpose, behaviors, and risk taking deeply within the organization, but your customers and their needs likely aren't changing on the same schedule.

Established processes are one way to cement changes; written documents are another. Formal documents that lay out the agency's customer-experience vision—anchored in what matters to its customers and progress to date—can guide and sustain customer-experience programs through times of change. Chronicle and share key decisions, major successes and their impact, and critical steps to move in the direction of the shared goal of improved customer experience. Provide teams with a record

of their successes that they can be proud of. Give them something to highlight when administrators inevitably change to preserve their platform, empower themselves, and preserve the customer's voice through a transition.

In the space of five years, the US Department of Housing and Urban Development (HUD) underwent a transition to a new secretary, a new commissioner of its Federal Housing Administration, and two new leaders of the business unit at the center of its customer-experience transformation. In the face of so much turnover, HUD maintained positive momentum in advancing customer-experience goals, largely due to a detailed strategic plan and an extensive report it produced for the US Congress. The report detailed its progress on metrics, the "story" of its transformation, the decisions made on and rationale for budget requests, successes achieved relative to the strategy, and key takeaways. Detailed records of both what HUD had achieved and why helped avoid "organizational amnesia." Despite these major transitions, HUD succeeded in improving customer outcomes and customer-satisfaction scores as well as boosting employee engagement, morale, and efficiency.

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Transformation of any kind isn't easy. As both the necessity and benefits of customer-experience improvements become increasingly evident in the public sector, we hope the lessons of government leaders can help decode the puzzle of serving customers better. ■

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[1] Governments serve their citizens as well as an array of other constituents and stakeholders. In this article, the term "customer" refers to all those who make use of government services.

[2] Social-media scraping refers to collecting and analyzing large volumes of public posts on websites like Twitter.

[3] Geofencing refers to using location data through platforms such as GPS or Wi-Fi to create a virtual perimeter within an actual physical space. In this case, it allowed the airport to identify and review the social-media posts made by users located at a specific gate.

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