

# Building a long-term customer-experience vision at the Social Security Administration

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Carolyn Colvin, the Social Security Administration's former acting commissioner, discusses the critical elements in incorporating customer-centric thinking in a high-level strategy.

Carolyn Colvin served as the acting commissioner of the US Social Security Administration (SSA) from February 2013 to January of this year, when she stepped down. In her role, she oversaw one of the largest agencies in the federal government, with more than 60,000 federal employees nationwide working with another 16,000 state employees who make medical determinations in the SSA's disability program. Before her departure, she sat down with McKinsey's Kristin Allstadt and David Malfara to discuss how she mobilized her workforce toward a common goal of providing an excellent citizen experience.

**McKinsey:** *What are your organization's goals related to customer experience?*

**Carolyn Colvin:** The way I see it, our customers don't have a choice when it comes to obtaining our services. They can't go to a competitor if we are not performing well, so we have an even greater responsibility than does the private sector to provide a great experience for our customers. We also need to ensure that all agencies provide a consistently excellent experience, because the citizens do not separate, for example, the SSA, the US Postal Service, and the Department of Homeland Security in their minds. To them, we are all the same, so if one of us performs poorly for them, it affects their perception and confidence in the whole system.

**McKinsey:** *How do you focus and articulate your customer-experience aspirations?*

**Carolyn Colvin:** When we started digging into this, we found that we were a functionally excellent organization that was good at the tactics of running our operations. For example, we were great at engaging with the caller on the phone or the citizen in front of us in a field office. We did not, however, have enough focus on a higher-level strategy to be viable and relevant in the coming years.

One of the first things we did was to focus on a long-term vision document called Vision 2025. When we look to the future, we know that needs are changing. Our customers span every generation, and we support them across their entire life's journey. It was important to understand what the changing needs were in the market and the impact those needs were having on business. The Vision 2025 document was a way to start articulating our goals and anticipating future needs so that we could be prepared as an organization. It's an aspiration for our future tied to three major pillars: superior customer experience, exceptional employees, and an innovative organization.

**McKinsey:** *How has that vision been received within the organization so far?*

**Carolyn Colvin:** I think our entire agency now sees customer experience as their responsibility. That started with Vision 2025 and the three pillars, but we did much more to embed the change within the organization. We established priorities and regularly review progress on them, and that starts from the top. Performance evaluations now have

citizen-experience elements built in to ensure that we are having the right conversation around experience delivery. We also reestablished an office of the chief strategic officer to help focus the entire agency on long-term strategic planning, performance monitoring, and customer experience.

**McKinsey:** *What's the thinking behind that approach?*

**Carolyn Colvin:** I think we have to set the vision from the top and exhibit the change for which we are looking. I accept calls from our constituents at home, and people think I'm crazy for it, but I want to show our entire organization how important it is to resolve the needs of the customer. If someone does call me, it's because they were frustrated enough to find a way to call me at home, so I'm happy to take the calls and role-model the type of service I want my people to demonstrate. If I don't send the message that this is important, then I would be naive to expect the staff to follow suit.

**McKinsey:** *You mention that exceptional employees are one of the pillars of Vision 2025. Can you talk about engaging your frontline workers in customer experience?*

**Carolyn Colvin:** We have one of the largest workforces in government, so we spend a lot of energy listening to and engaging our front line. We launched the "why I serve" campaign as part of our 80th anniversary as a way to hear from our employees and understand what made them come into work every day. I've also been to over half of our field offices, and I love to hold town halls and hear from the people within our organization. I want to understand what their challenges are and what they need from us to ensure we are providing the tools, resources, and training they need to do their jobs. Any time I visit an office, I make sure to

use and listen for the language in our Vision 2025 to make sure it is gaining traction.

One unique employee feedback program is our Commissioner's Challenge. I ask all of our employees what they would do if they were the commissioner. We get thousands of ideas from across the organization, and it gives us both a method to engage our front line as well as a way to hear great ideas from people who work with the customers every day. We've had submissions on everything from playing educational videos in the lobby while customers are waiting to setting better expectations on waiting times in line at our offices so people know what to anticipate.

**McKinsey:** *How do you measure success for customer-experience programs?*

**Carolyn Colvin:** Customer satisfaction is an agency priority. So, we leverage our Analytics Center of Excellence (ACE) to conduct in-depth customer-satisfaction studies and measure how we are meeting our priority goals. We've set ACE up to be a central hub of data and customer analytics within the organization. The mandate is to understand the various data we have across the organization that could provide insight for how we operate and serve customers. We are creating a culture where decisions are based on good data and insight. To that end, ACE supports workforce skill development, ensuring that staff from every level of the agency have the analytic skills to draw insights from data, especially to help improve the experience.

**McKinsey:** *Are there a specific set of metrics that the analytics team reviews?*

**Carolyn Colvin:** We start with a top-line understanding of satisfaction by channel—field,

phone, and website—but those high-level measures of satisfaction don't provide enough to take action and improve. So we try to understand the key performance indicators that drive satisfaction one level lower. We track how long it takes to receive a decision, our backlog of pending decisions, office and phone queue times, busy rates, call-back rates, and end-to-end time to get a Social Security payment. At a high level, we know that people want service to be easy and convenient, and that first-call resolution is extremely important. People are willing to wait a little longer as long as their issues are resolved.

**McKinsey:** *Is that system of metrics something that was recently developed, or did it grow over time?*

**Carolyn Colvin:** It was developed gradually and somewhat organically. I remember the first set of customer metrics being newly established when I joined as the deputy commissioner of policy and external affairs in 1994. We've gotten much better with time, but there is always room for improvement. The one thing I don't have a good grasp on yet is our satisfaction break point for queue length. Right now we think it's anywhere from 30 minutes to an hour, but we need to do more analysis to figure it out.

**McKinsey:** *What challenges have you faced to building this customer focus?*

**Carolyn Colvin:** Budgetary constraints are always a challenge, but we try to make sure that budget does not drive vision, rather that vision helps us prioritize our limited resources. When we are deciding how to spend funds, we know that we've already laid out a strategy, and we spend based on our stated priorities. For instance, we created an information-technology investment process and board, and the prioritization criteria

are heavily weighted based on our strategy. That is why the strategic-planning process was so important for us. We are trying to invest based on where we want to be.

In addition to funding, I would say it was difficult making the staff realize how critical they were to the citizen experience. Many people in HQ have never worked in a field office and didn't fully appreciate how critical our frontline roles are to executing on the vision we had established. We have now started requiring that senior management spend time out in the field to really experience those roles. On the flip side, we invited those in frontline roles to come spend time at headquarters—both to understand what we do as well as to share their ideas and insights for how to improve the process.

**McKinsey:** *What is your vision for the future?*

**Carolyn Colvin:** We would like to collaborate more with other agencies. We've started talking with the Internal Revenue Service and the Department of Veterans Affairs [VA] to learn and develop our capabilities. For example, we know that if we share data with agencies like the VA, then veterans who are filing for Social Security will be processed faster, so we are working to facilitate those agreements. I think the next step is to partner with local and state agencies, because citizens sometimes come to us needlessly for verification of benefits, and we want the locals to be able to facilitate that process.

**McKinsey:** *What advice do you have for other agencies who are taking on a customer-experience-transformation effort?*

**Carolyn Colvin:** Most customer-facing organizations will experience being so focused on the person in front of them that they neither define

what customer experience means nor develop a long-term vision. My advice would be to take the needed time to define the activities needed to achieve the long-term outcome, and define metrics that are public and help you push toward those goals. Take time to assess what you are doing well and what you should do better. Take the time to get

buy-in and feedback from the employees. You can set the strategy, but the staff has to execute. ■

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