



CX: Reaching People Where They Are





Introduction

Regardless of where they live or what they do, everyone has personal interactions with government and appreciates, firsthand, the value of a good customer experience (CX). So for public-sector employees, the challenge isn't knowing why positive CX makes a difference. The challenge is knowing how to achieve it.

In this guide, we explore three specific ways to improve CX — accessibility tools, omnichannel communications and journey maps. And by “explore,” we mean offer how-to directions and clear-cut tips and techniques. Have you ever wondered, for instance, how to make your online forms accessible? We tell you.

We also provide a window into CX initiatives that are transforming a much-maligned agency: the Internal Revenue Service (IRS). Taxpayers may be predisposed to dislike the IRS, but the agency is working hard to win them over.

And because technology underpins many CX reforms, we also look at tools available to help agencies reach constituents wherever they are, in whatever way they need. That makes for a more effective, inclusive and compassionate government.

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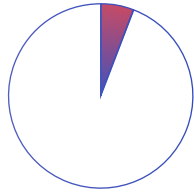
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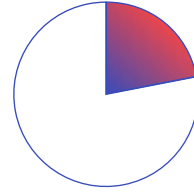




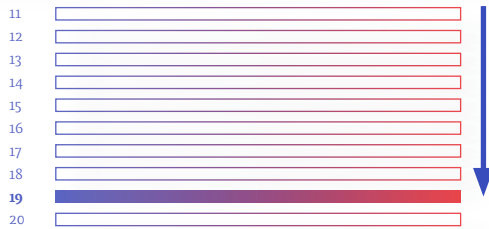
By the Numbers



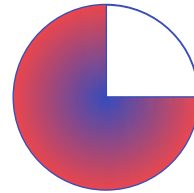
Only **6%** of constituents prefer engaging with government using automated, interactive voice technology.



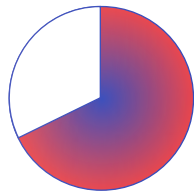
22% of Americans say they trust the federal government “just about always” or “most of the time.”



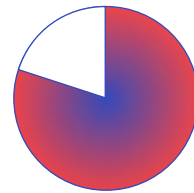
The U.S. ranks **19th** in worldwide e-government development, down nine places from 2022.



Better government CX can reduce the risk of negative media coverage by **75%**, research finds.



68% of the population was satisfied with federal government services in 2023.



Nearly **80%** of customers switch channels when navigating a state agency service.



36: the number of CX improvements called for in the 2021 Executive Order on Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government



5 out of 21 state services — vehicle services, taxes, public transit, affordable housing and unemployment insurance — account for more than half of residents’ overall satisfaction with state government.



Improving the Accessible Experience

Accessibility is an essential ingredient for good CX, but it's often a challenge for government agencies that lack expertise and budgetary resources. We spoke with Douglas Goist, Program Manager for Workforce Development at [NSITE](#), the talent enterprise for the [National Industries for the Blind](#), about ways agencies are meeting that challenge — and how they can do better. Goist also is a former GovLoop Featured Contributor, who wrote about [accessibility issues](#).



Where are government agencies falling short in providing constituents with an accessible digital experience?

A.

Government agencies often fall short for several reasons:

- ◆ **Outdated Technology.** Many agencies rely on [legacy systems](#) that aren't designed for accessibility. Their compatibility with assistive technologies such as screen readers and keyboard navigation may be limited. Unfortunately, many systems and interfaces that were created before the passage of the 1990 [Americans with Disabilities Act](#) did not consider accessibility. As a result, users with disabilities still occasionally encounter [green screen interfaces](#) that were designed as far back as the 1950s.
- ◆ **Lack of Awareness.** Staff members may have inadequate training on accessibility standards and best practices. For example, when an employee prints a PDF document and routes it for signature, the signed document typically gets scanned back into a PDF. Scanning turns the document into an image, which a screen reader can't read. Blind users are forced to perform [optical character recognition](#) to extract the text from the image — and that can be inaccurate. Worse, scanned PDF application forms cannot be filled out digitally, requiring users to have the dexterity of putting pen to paper.
- ◆ **Complex Processes.** Government websites and applications can be overly complex and difficult for users with disabilities to navigate, especially people who have cognitive and visual impairments. This can create frustration and limit access to essential services.





What steps can organizations take to address these shortcomings?

A.

To improve digital accessibility, government agencies should:

- ◆ **Prioritize Accessibility.** Make accessibility a core component of all digital initiatives. This includes incorporating accessibility standards into project planning, development and testing.
- ◆ **Train Staff.** Provide comprehensive training on accessibility standards, best practices and the use of assistive technologies. This will empower staff to create more inclusive digital experiences.
- ◆ **Conduct Regular Audits.** Regularly assess websites, applications and other digital assets to identify and address barriers to accessibility.
- ◆ **Engage With Users.** Involve users with disabilities in the development process to gain insights into their needs and experiences. This can help ensure that digital experiences are truly inclusive.

What are agencies doing well in terms of accessible online constituent experiences?

A.

Although challenges persist, some government agencies are making strides in providing accessible digital services. For instance:

- ◆ **Accessibility Statements.** Many agencies have published clear accessibility statements outlining their commitment to inclusion and providing information on how to report accessibility concerns.
- ◆ **Alternative Formats.** Some agencies offer alternative formats for content, such as Braille, large print, and audio descriptions, for users with various disabilities.
- ◆ **Accessible Forms.** Organizations often design online forms so they're compatible with assistive technologies, making it easier for users with disabilities to complete them.
- ◆ **Accessible Mobile Experiences.** Agencies are increasingly focusing on creating accessible mobile experiences, recognizing how important mobile devices are for many users.



Tips for Digital Accessibility

Add alt text descriptions:

Alt text, or alternative text, provides a concise description of visual content, allowing assistive technologies to convey the information to individuals who are blind or visually impaired.

Use heading styles:

Another common barrier to accessibility is using bold font headings rather than built-in heading styles. This might seem like a minor detail, but headings make the organization of your document accessible. Screen readers can translate heading styles because they're automatically formatted, but bold font will be read as regular text. (For more suggestions on making Microsoft Word documents accessible, see Goist's article [here](#).)

Base PDFs on accessible documents:

To make PDFs that screen readers can read, Microsoft [recommends](#) starting with a Word document that has proper heading styles, tags, and alt text for images.

Use built-in accessibility tools:

For example, Microsoft's Office suite, including Excel, PowerPoint and Word, has an [Accessibility Checker](#) that flags problems. Once launched, it examines documents and shows you exactly how to remediate any issues.

Buy with accessibility in mind:

The General Services Administration's [Accessibility Requirements Tool](#) provides a step-by-step guide that helps government procurement professionals identify accessibility requirements according to Section 508 standards. The tool generates specific copy-and-paste language that all government contracting personnel must include in their procurement solicitations, especially information and communications technology purchases.

5 Ways to Create Accessible Forms

Developing accessible forms requires some care during coding. Here are tips from the [UX Collective](#):

- ◆ Make sure people can navigate the forms using a keyboard.
- ◆ Add contrasting colors to identify fields, so people with visual or cognitive disabilities can identify what areas they must fill in.
- ◆ Use labels with form fields and inputs. Screen readers generally navigate using keyboards and will skip fields that aren't labeled.
- ◆ Flag errors at the top of the page and, if you can, link the error back to its related form field.
- ◆ Use reminder text with labels. If a user needs to search for information (i.e., a customer number) to fill in an input field, it's helpful to include reminder text alongside the label for that field, so the person doesn't forget what they're looking for. Reminder language is especially helpful for people with cognitive disabilities.

More Resources

[Section508.gov](#)

[U.S. Access Board](#)

[Web Accessibility Initiative](#)

[Department of Health and Human Services accessibility resources](#) (Other agencies also offer accessibility guidance.)

Personalization Can Transform Government CX



Click here to watch

“Government information is life-changing and lifesaving, and [agencies] need to ... cut through the noise of everything that someone receives in a day.”

— Charlotte Lee, Granicus

About Granicus

At Granicus, our mission is to help better engage government and the people they serve. With more than 2,000 employees across the globe supporting more than 7,000 public sector organizations, Granicus is a trusted partner for governments to make meaningful connections by enhancing customer experiences, engaging more communities, improving operations, prioritizing equitable reach, increasing trust and transparency, and simplifying compliance.

Learn more: <https://granicus.com>

Government communications often seem perfunctory: An agency wants to tell constituents about an upcoming deadline, for example, so officials broadcast messages to the entire community. But that generic approach misses an important CX opportunity, even when agencies use multiple channels — SMS messages, email, social media, website content, etc. — to reach their audience.

Personalization is a more effective, tailored way to contact people where they are. It uses data to target messages to specific individuals, thereby driving community engagement and ultimately fostering trust in government — something in low supply these days.

“Government information is life-changing and lifesaving,” said Charlotte Lee, Granicus’ Strategic Lead for CX and Innovation, “and [agencies] need to ... cut through the noise of everything that someone receives in a day.”

In this video interview, Lee discusses how personalization improves government service delivery. Topics include:

- ◆ The strategy behind personalized communications
- ◆ How data helps agencies individualize their digital outreach
- ◆ Obstacles to personalizing government communications



Omnichannel Communication: What, Why and How



Innovation offers new opportunities to connect with constituents — an assortment of digital, hard-copy and in-person methods that, used thoughtfully, can create the seamless user experience that the 2021 [CX executive order](#) and the [President’s Management Agenda \(PMA\)](#) envision. The idea is to eliminate the “time tax” that makes it hard for people to engage with government; deliver simple, secure services; and prioritize the public’s needs and concerns.

In the following pages, we offer tips for developing an effective omnichannel strategy that achieves those goals, and we reveal what types of outreach the public prefers. Hint: Some answers may surprise you.



Multi vs. Omni

Multichannel: when an organization uses several communication methods, such as websites, social media, email, chatbots, mailings, telephone conversations and in-person contact, but each channel might have its own goals and metrics. The messaging might be disconnected rather than unified and consistent, akin to ordering off an a la carte menu.

Omnichannel: when an entity integrates various communication channels to deliver a seamless, inclusive and coherent experience for users. An omnichannel strategy benefits both constituents and employees and leads to higher satisfaction rates and greater time savings.

5 Tips for Omnichannel Communication

1. Focus on people’s experiences, not your technology.

Before deciding what type of outreach to pursue, know [what constituents want](#) and what technology they can use. SMS reminders are unhelpful if your target demographic doesn’t use text messaging, and in-person offices may be inaccessible in many rural areas, for example. In addition to equity and accessibility, consider whether people will need to supply personally identifiable information; that could impact how comfortable they are with certain channels.





2. Deliver a cohesive experience.

Each person's interaction with government — applying for social services, renewing a driver's license or investigating zoning rules, for instance — is a journey that involves multiple touch points, so prioritize the most common and helpful engagement options for those objectives. Together, these approaches should provide a personalized, fluid experience in which each channel integrates what someone has seen previously, what actions they have taken and what their next steps are. Tailor your content for the specific channel you're using — e.g., language in an email may not work for a social media post. Start small, if necessary.

3. Break down data silos.

To create and maintain a personalized omnichannel system, you need real-time data sharing across channels, agencies, locations and departments. That could require investing in technology that allows for up-to-the-minute data exchanges or developing or strengthening your data governance standards and reorienting workflows. Despite those challenges, the data that you gather and share today could provide important insights to measure and adjust your current approach and craft future communication strategies.

4. Develop a user-centric culture.

Agency leaders must see the wisdom in omnichannel outreach because the required technology and staff commitment could be significant. Unified messaging calls for collaboration, skills training, and agility that perhaps hasn't existed before. And frontline employees delivering services — e.g., via a call center, physical office or online chat — must understand where they fit into a constituent's journey so they can contribute to a unified experience.

5. Embrace innovative technology.

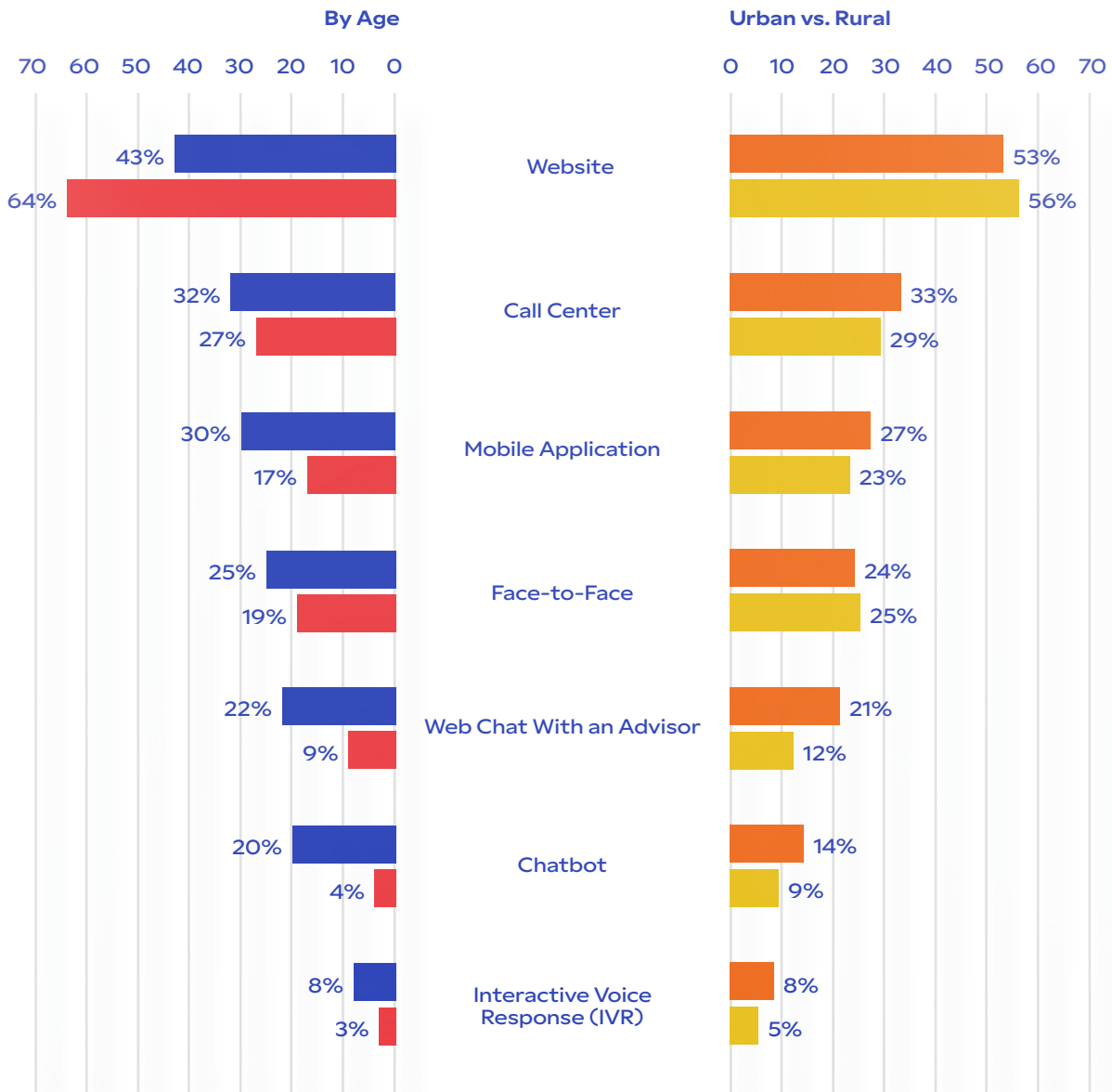
AI and other automation tools are essential for omnichannel communications. The technology helps integrate multiple channels and, by analyzing massive datasets amazingly fast, it can ensure that messaging is relevant, timely, cohesive and clear for the target audience. AI also helps agencies better understand their constituent preferences and measure results. So, look at how automation can facilitate CX — technology is the means, not the end — and establish appropriate processes, governance and employee roles.

“The government must build our understanding of our customers and involve them — the people we serve — to improve benefits, services, and programs and enable us to deliver for all Americans,” according to the PMA. “We can get there by using technology to power outstanding experiences.”



Preferred Methods of Interacting With Government

■ 18 to 34 years
 ■ 55 and above
 ■ A large city
 ■ A rural area



Source: Deloitte Digital Citizen Survey, April 2023



How to Deliver High-Quality Omnichannel Constituent Experiences



Click here to watch

About DocuSign

Over 4,000 local, state, and federal customers use DocuSign solutions to bring agreements to life. With intelligent agreement management, DocuSign unleashes mission-critical data that is trapped inside of documents. Until now, these were disconnected from systems of record, leading to delayed service delivery, employee frustration, and increased compliance risk. Using DocuSign's Intelligent Agreement Management platform, organizations can create, commit, and manage agreements with solutions created by the #1 company in e-signature and contract lifecycle management (CLM). For more information visit <http://www.docuSign.com>.

“The goal should be that every [channel] provides the same level of intuitiveness and immersive engagement, regardless of how an individual chooses to interact with the particular government agency.”

— Michael “M.J.” Jackson, DocuSign

In the private sector, it's often said that if you don't take care of your customer, somebody else will. In the public sector, it's a different story, because constituents typically cannot turn to a competitor if an agency fails to deliver quality services.

That's what makes omnichannel communications so vital to improving the constituent experience, said Michael “M.J.” Jackson, Global Head of industries at DocuSign. Agencies need to ensure services are available through whatever channels constituents prefer, whether that's the web, email, social media or text messaging.

In this video interview, Jackson describes how a focus on omnichannel communication can result in higher constituent satisfaction and deliver improved outcomes. Topics addressed include:

- ◆ The role of accessibility in delivering effective omnichannel communication
- ◆ Three factors that shape a constituent's experience with government
- ◆ The connection between a better employee experience and improved constituent services



Journey Maps Help You Find and Fix Problems

Journey maps are one of the most effective and perhaps underutilized ways of understanding what constituents experience and how best to serve them. The maps help agencies set priorities, allocate resources and identify process improvements, and they help ensure that government services are accessible and seamless. Here's how [journey maps](#) work.

Key Definition: User Personas

Generalized, research-based [profiles of key customers](#) that capture what an agency knows about its audience. Personas tell stories, and an agency might need to create multiple personas if targeting more than one demographic for the same product or service. For instance, when GSA helped USDA develop [Farmers.gov](#), it created [three personas](#): Fred, an experienced producer; Amelia, a beginning producer; and Bob, a loan officer.

What Is a Journey Map?

It's a visual, data-driven tool that shows the stages a customer must go through when interacting with an agency — e.g., to apply for healthcare benefits — including psychological and emotional responses along the way. Journey maps typically feature graphics, multiple colors and some combination of charts and diagrams, but all journey maps reflect four things:

- 1 The **steps** needed to achieve a goal, including official procedures, workarounds and incidental steps
- 2 Specific **actions and decisions** the customer must make
- 3 **Touch points**, or ways the person interacts with an agency and its systems, such as through in-person meetings, text messages, email, website content or phone calls
- 4 The person's **emotions**, both positive and negative, throughout the journey

8 Tips for Creating an Effective Journey Map

1. Get Leadership Buy-in

Journey maps can identify important opportunities to improve CX, but if leadership is unwilling to solve the problems a journey map clearly shows, then the maps become an exercise in futility. And if executives won't commit the time and resources needed for effective journey mapping, then consider: Is a half-hearted map worth pursuing?



2. Define the Objective and Scope

Sounds obvious, but what are you trying to accomplish? What insights you are aiming for? Know in advance who will use the findings and how, and to avoid distraction and mission creep, make sure the journey has a clear beginning and end.



3. Use the Right Data

You should base your user personas on trusted data from a variety of sources. Frontline personnel can offer important anecdotes, but website analytics, focus groups, surveys, and social media feedback, for instance, also are important. Walk in a customer's shoes.



4. Flesh Out Personas

The data will reveal common themes that help you build individual personas — e.g., a 65-year old widower who lives in a city and has limited broadband access. Different aspects of a persona may be more meaningful for some teams than others based on each team's primary objective.





5. Map the Stages

Plot the stages of the journey from start to finish and tie each stage to a specific goal. For example, an initial stage might be when a customer realizes they need a service. The next stage would be researching the service, followed by applying for it, using it, etc.




7. Identify Areas for Improvement

Fleshing out the customer's journey should reveal pain points you can alleviate. Once you identify problem areas, brainstorm possible solutions and present them to stakeholders and to leadership who can ensure their execution. Perhaps you can make it easier for people to find a registration form on your website or maybe you can shorten call-center wait times. If it's helpful, think about what the ideal customer journey would look like.



6. Add Step-By-Step Detail

Based on data, identify the steps a customer would take within each stage and how the person likely would interact with your agency at those points. If you think about someone researching a service, for instance, the person probably will search online and wind up on your agency website, where they will click on links to specific information that will take them, perhaps, to an online form. Your journey map also must capture what the customer is thinking and feeling when taking those actions; that way, the map shows more than just the process. For example, is the person frustrated because they had to click four different links on your website before getting to the signup form? Journey maps often are lengthy and complex, and one reason is because detail makes the maps worthwhile.



8. Fine Tune Data Over Time

Journey mapping is a process that never ends. Your maps should evolve over time, updated to reflect new data, technology, and agency improvements; new metrics will show if your reforms are bearing fruit. Mapping won't solve your CX problems, but it will help you identify and understand them.



Examples to Guide You

You don't need to create a journey map from scratch: There are both free and vendor-available templates to start from, and sometimes a simple Microsoft Excel spreadsheet is a good way to begin. But to give a sense of what's possible, here are some government-specific maps for reference.

[Performance.gov: Transitioning to Adulthood](#)

[Performance.gov: Surviving a Natural Disaster](#)

[Agriculture Department \(USDA\): Direct Farm Loans Journey Map](#)

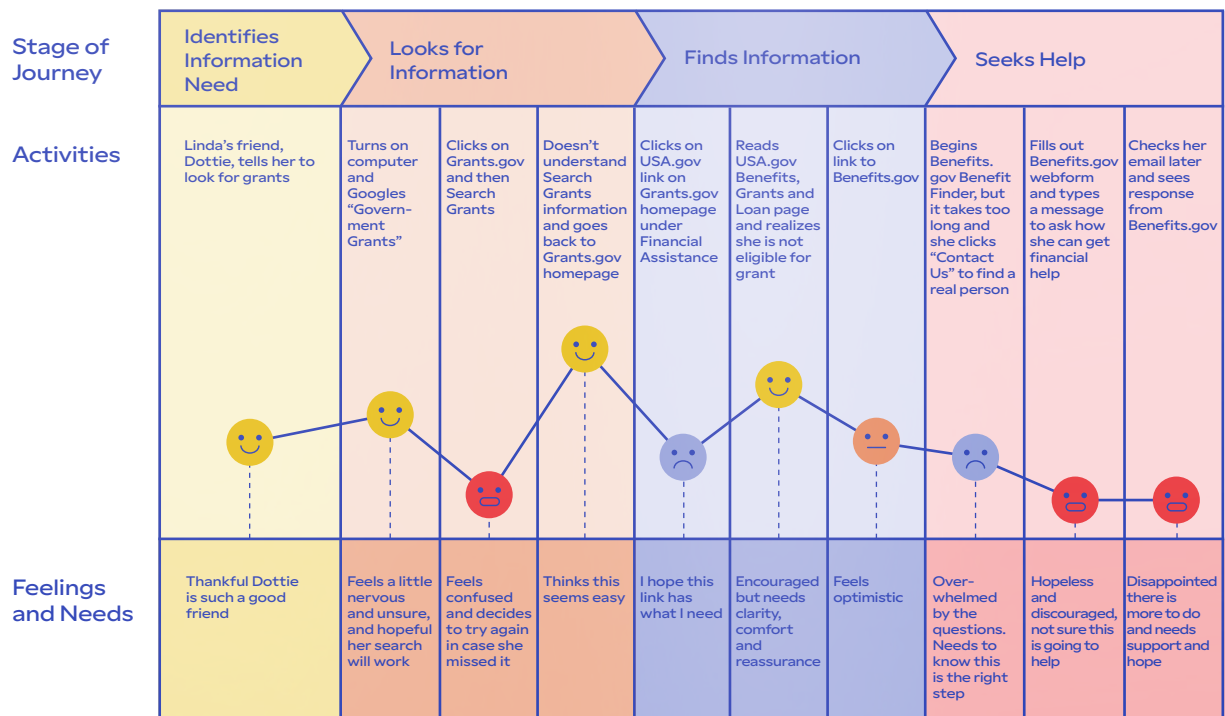
[Department of Housing and Urban Development: Affordable Housing for Seniors Journey Map](#)

[Veterans Affairs Department: Journeys of Veterans Map](#)

[Georgia Technology Authority: Journey Map Resources/Template](#)



A USA.gov Journey Map That Improved Agency CX



Source: Digital.gov

"I wisely started with a map." — J.R.R. Tolkien

IRS Makes Progress on Creating a Better Taxpayer Experience



An interview with Courtney Kay-Decker, Deputy Chief Taxpayer Experience Officer, IRS

It is easy to find public-sector employees who value and strive to advance good CX. Government workers want to do well by constituents, after all. But it is more challenging to find someone as genuinely enthusiastic about CX as Courtney Kay-Decker, the IRS' Deputy Chief Taxpayer Experience Officer.

The IRS, prompted by the 2019 Taxpayers First Act, created Kay-Decker's office roughly three years ago to improve IRS service delivery; she joined the team in December 2022 and is excited about the opportunity to make tax-paying less burdensome. "Our life has been relatively short and crazy busy with ... transformation [work]," she said, but "it is fun, fun stuff watching great [things] happen in tax administration."

Finding Balance

Oliver Wendell Holmes, Jr. may have said that taxes are what we pay for a civilized society, but that doesn't mean people enjoy paying them. So the Taxpayer Experience Office's overall goal is to **make customer interactions simpler and more seamless while maintaining strong cybersecurity**. And although digital experiences are important, sometimes an analog option is a better choice, said Kay-Decker.

"We have this pent-up demand of people wanting more digital options, to be able to look at their accounts, to know what's happening in their tax life, so they can resolve it themselves and not have to call," she explained. "But that being said, we still want to make sure that we have phone service because sometimes the issues are so complicated to unwind [that you need a human.]"



Based on survey and other data — **"there's no shortage of people telling us how they feel,"** Kay-Decker laughed — the IRS made many front-end changes to IRS.gov early on, such as improving the functionality of online accounts, "because we wanted the public and Congress to see we could do it," she said. But what looks good on the front end can be a big challenge behind the scenes.

"It is unbelievably complicated to make sure that the back end does all the stuff that it needs to do to make the front end pretty," said Kay-Decker. For instance, the IRS has a new document-upload tool — an alternative to mailing and faxing — that helps taxpayers.

But on the back end, the agency is still figuring out how to build the technology that will deliver uploaded documents to the correct person for processing or will process the data automatically.

Working Around Restrictions

The IRS "reskinned" its [Where's My Refund?](#) webpage because customers said, among other comments, that it didn't look like an official




government website, Kay-Decker said. It's now easier to use, feels more like an IRS resource and provides status updates on taxpayer refunds. "We did that recognizing, though, that there's a limit to what we want to provide at the level of [identity] authentication you [need for] Where's My Refund?" she said.

There are other restrictions that IRS must accommodate. For example, federal law still requires the agency to send some notices via hard copy — but traditional IRS letters, Kay-Decker acknowledged, look outdated and are tough to understand. The agency's new [Simple Notice Initiative](#) aims to change that.

"We're working to take the most frequent notices and apply plain language principles to them and put up front what ... you need to do," she said. It's about "finding ways not only to make the notice more readable and simpler, but then giving you the ability to find more information on our website, and making what's on our website clearer as it relates to that notice."

IRS understands that many people interact with the agency more than once, in more than one way. "**We're trying to think about that whole journey,**" Kay-Decker said. "If I'm a taxpayer who had a problem, is getting a notice, what are all the touch points that I might need to have, and how do we make those as simple, seamless and secure as our taxpayers need [in order to] get through whatever they need to get through, and be done until next year?"

"It's not a secret to the world what some of our challenges are," Kay-Decker mused. "But we're trying to tick them off one by one to make things better."



"It is unbelievably complicated to make sure that the back end does all the stuff that it needs to do to make the front end pretty."

—Courtney Kay-Decker



Conclusion

This resource is Part 2 of our 2024 CX guide series. Here's a look at [Part 1](#):

CX: Turning Good Ideas Into Practice

What's Going on in CX?

Agencies at all levels have improved their CX since the White House issued an executive order to transform federal CX and service delivery. We explore what they've accomplished, as well as new CX research.

Tips & Takeaways: Community Surveys

Surveys provide critical data to help agencies develop and measure their CX initiatives — but only when used correctly. We offer tips for structuring, wording, distributing and following up on community questionnaires.

A Digital Forms Checklist

Online forms are wonderful ways to streamline internal processes, generate usable data, and enhance public access to government resources. We provide step-by-step guidance for designing, deploying and managing your online forms.

Worksheet: Putting Human-Centered Design Into Practice

CX projects won't meet expectations if they prioritize the agency's needs, not the customer's. We explain what that means in practice and help you evaluate how human-friendly your programs and initiatives actually are.

About GovLoop

GovLoop's mission is to inspire public-sector professionals by serving as the knowledge network for government. Govloop connects more than 300,000 members, fostering cross-government collaboration, solving common problems and advancing government careers. GovLoop is headquartered in Washington, D.C., with a team of dedicated professionals who share a commitment to the public sector.

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Thank You

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