

CX: Turning Good Ideas Into Practice



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Introduction

Agencies can improve the constituent experience (CX) in many ways, but one of the most important is also the most basic: Just make it easier for people to access the services or benefits they need. This mandate is spelled out in the Paperwork Reduction Act, the 21st Century Integrated Digital Experience Act, and the Reducing Administrative Burden initiative. Agencies get the concept but now, it's a matter of turning that concept into practice.

This guide offers case studies and other insight into innovative CX approaches, as well as tips and takeaways, a checklist and a worksheet to guide agencies in their CX efforts. We also provide thought leadership from industry experts, who explain how technology can enhance CX.

Table of Contents

What's Going on in CX?

Page 3

Tips & Takeaways:

How to Get More Insights Out of Community Surveys

Page 7

A Digital Forms Checklist

Using Online Forms to Improve CX

Page 11

Worksheet:

Putting Human-Centered Design Into Practice

Page 13



What's Going on in CX?

It's been more than two years since the White House released an executive order (EO) titled "Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government." Among other provisions, the order established a governmentwide "Life Experience" framework that aims to support constituents at critical moments in their lives, including recovering from a disaster, having a child, facing a financial shock, approaching retirement and transitioning to civilian life.

Federal agencies, such as Agriculture, Commerce, and Housing and Urban Development, reported their progress at the end of last year. Many others, down to the local level, have developed CX innovations.



The **Department of Labor** updated its website for migrant workers to include six new languages. Also, recently, it released a Miner Safety and Health app, which helps miners understand their rights and responsibilities, best safety and health practices, how to receive accident notifications, and how to prevent disasters.



Pennsylvania revamped its travel information service, with improved accessibility, real-time weather forecasts and traffic information, access to traffic cameras, and other new mobile app features.



Last year, the village of **Skokie, Illinois**, released a new Skokie Streamline Service Optimization Portal, which automates and streamlines processes for a variety of village services and provides more self-service options.



San Mateo County, California, made strides with its Homeless Outreach and Mobile Engagement program, a geographic information system application that helps personnel identify homeless encampments, contact individuals and offer services.

A new rule under Title II of the Americans with Disabilities Act (ADA) establishes technical standards that will allow people with disabilities to fully access government websites and mobile apps. It's the first official clarification of the law for contemporary online formats.



Last year, the White House issued a set of guidelines titled “[Delivering a Digital-First Public Experience](#),” which advises agencies on website design and service delivery.

The public's preference for self-service and intelligent apps has encouraged AI use in CX, which requires AI expertise. More AI-focused positions are popping up, such as [prompt engineer](#), that center on building generative AI systems.

The Partnership for Public Service [offered wisdom](#) on using AI to support CX. It recommends:

- ◆ Strong governance structures
- ◆ Hiring chief AI officers, a job that the [2023 AI EO](#) created
- ◆ Implementing human-centered design
- ◆ Establishing a hiring infrastructure

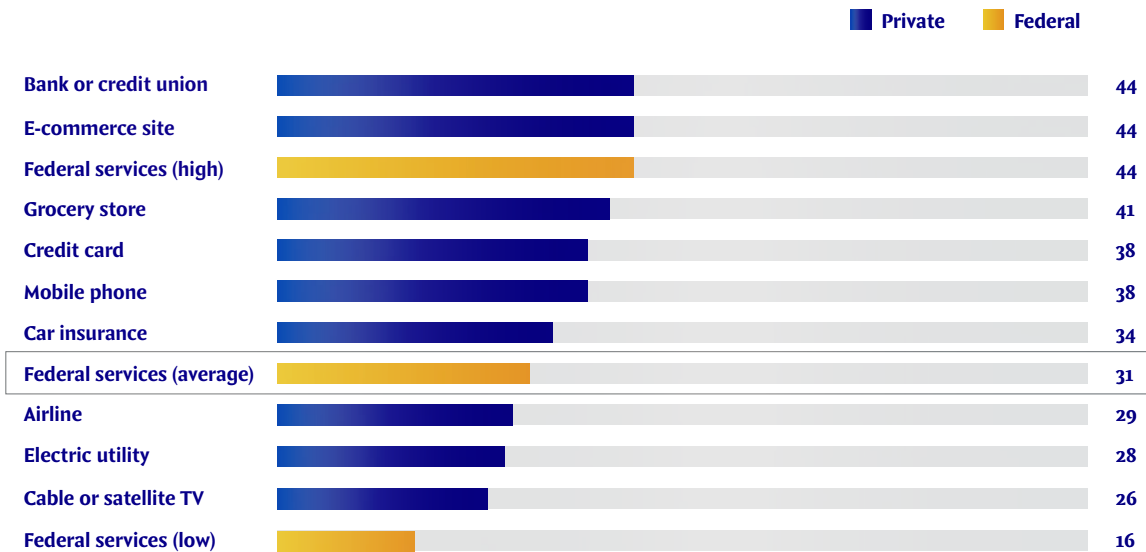
A [2023 McKinsey & Co.](#) survey of 30,000 constituents assessed experiences with more than 40 federal government services, including during the five “life experiences” the 2021 EO identifies. Among other things, the survey revealed that:

- ◆ People who are young and underrepresented and who have low incomes are less satisfied with federal government services than other demographics.
- ◆ Constituents would be most satisfied with self-service solutions and increased communication.
- ◆ Information gaps are the biggest burden for constituents navigating life experiences.

The General Services Administration is working on an open source AI-supported tool, “[Gov CX Analyzer](#),” which evaluates how individuals interact with government websites.

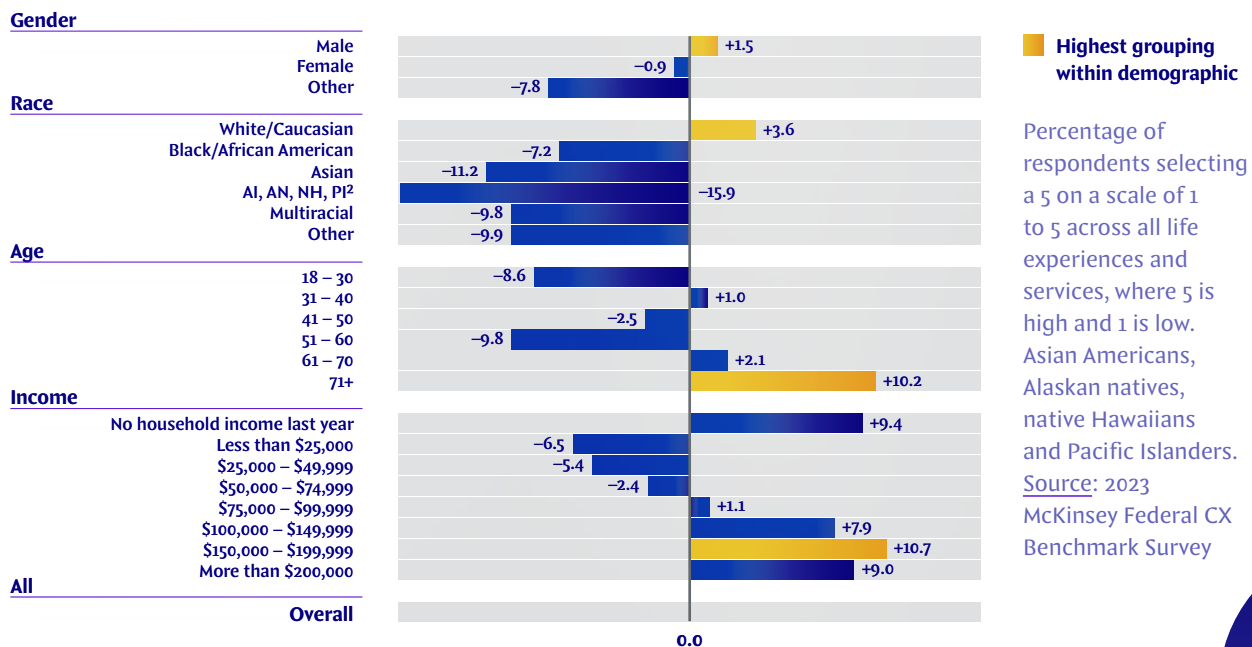


Federal government lags the private sector in customer satisfaction.



Response to “Please indicate the extent to which you are satisfied with each provider type.” Percentage of respondents who chose 5 on a 1-to-5 scale, where 5 is high and 1 is low. [Source](#): 2023 McKinsey Federal CX Benchmark Survey

Young, low-income, underrepresented groups are more dissatisfied with federal services.



Digital Technology for Better CX

An interview with Bob Ainsbury, Chief Product Officer, Granicus



Not long ago, good customer experience (CX) revolved around easy-to-use online application forms and similar conveniences. But private industry has raised our expectations — think about all the status updates we receive after ordering an online product — and government must catch up.

“Expectations have really changed and increased, and agencies need to use these [new] paradigms ... when providing services,” said Granicus’ Bob Ainsbury. “It’s [about] being aware that [CX] is from start to satisfaction, not the [digitized] application itself.”

The Golden Rule is to focus on outcomes, since that’s ultimately what people care about, he said. The second guiding principle is to remember that good solutions call for personalization — which requires data.

Integrating Data

“You might imagine that agencies are swimming in data,” Ainsbury said. “But ironically, when we at Granicus interact with agency analysts and operators, they almost see their agency as a data desert [because information is] often stored in ... detached and even uncooperative systems.”

Thoughtful agencies, he said, responded by creating data warehouses — repositories of agency data from different sources — to facilitate analytics and reporting. However, security and privacy concerns turned warehouses into vaults, “central places where the secrets and crown jewels were kept,” he said.

Newer technology — the data mesh approach — is a better option, he explained. Data can appear and behave as if in one location, but it actually resides in different places. Ainsbury noted that by using data meshes, such as those Granicus provides, to integrate disparate data, agencies have the data needed to securely offer personalized solutions.

For example, the Department of Labor (DOL) used Granicus technology for its HIRE Vets Medallion Program, which matches veterans who’ve left military service with employers looking for their skills. The DOL experienced a 127% increase in accepted applications with Granicus’ help, Ainsbury said.

Embracing AI and Machine Learning

There soon will be two classes of agencies, he predicted: innovators that embrace AI/machine learning (ML) by using solutions such as the Granicus Analytics Platform, and agencies that fall behind the technology curve.

Although not everyone is comfortable with artificial intelligence, AI/ML solutions that fuse and analyze data for public outreach are safe, and eventually more agencies will welcome generative AI, Ainsbury said. “Just because [some] aspect of AI/ML might be scary ..., there are other aspects of AI/ML that are ripe for the picking.”

“At the top of the innovation iceberg is AI and ML,” he added. “Below the surface is data.”

Granicus Experience Group

To help agencies achieve their CX objectives — ultimately supporting critical mission goals — Granicus’ in-house team, the [Granicus Experience Group](#) (GXG), is a strategic digital and communications starting point, Ainsbury said. Working closely with each agency, GXG understands its transformation challenges, opportunities, and budget constraints, and develops strategy resulting in more successful constituent engagement.

This personalized approach is “at the root of all that we do,” said Ainsbury. “Our entire business is connecting government in a meaningful way to the communities they serve.”



GRANICUS



Tips and Takeaways: How to Get More Insights Out of Community Surveys

The value of a community survey might be summed up this way: You don't know until you ask. You might have a good sense of how your constituents feel about a particular issue, but a survey helps you confirm — or revise — your assumptions, and it allows you to get more meaningful context.

That was the goal of the North Carolina Pandemic Recovery Office (NCPRO), which the state's governor created in 2020 to manage the distribution of federal recovery funds. Surveys provided a way to understand the pandemic's impact, both on constituents and the economy.

"We were in the heart of the pandemic, and we had this federal money, and we wanted to get it out the door to the right people and for the right uses," said Stephanie McGarrah, Executive Director of NCPRO, which is part of the North Carolina Office of State Budget and Management.

McGarrah and Kiel Kinkade, Program Analyst at NCPRO, recently spoke to [GovLoop's CX Community of Practice \(CoP\)](#) about survey creation. Here are some insights they shared.

Best Practices to Keep People Engaged

When creating a survey, think about the user experience. If people find a survey frustrating for any reason, they won't hesitate to quit, said Kinkade. He offered some basic guiding principles:

- ◆ **Ask questions in various formats.** If every question is answered with yes, maybe or no, or with a rating of 1 to 5, respondents might lose focus.
- ◆ **Write in a consistent style.** Big shifts in tone or vocabulary might throw people off.
- ◆ **Ensure that the questions and possible answers are easy to understand.** If people aren't sure what's being asked, they are likely to give up.
- ◆ **Keep the survey short and to the point.** If you ask too many questions, or the questions take too long to answer, you're only hurting yourself.

Imagine that the people taking the survey are looking for an excuse to quit.

Don't give it to them.



Question Formats: Multiple Options

To keep surveys engaging, Kinkade recommends using a variety of question formats, such as:

- ◆ **Multiple choice** (e.g., select one, top three, all that apply, etc.)
- ◆ **Sliders** (respondents move a button along a scale, such as 1 to 5)
- ◆ **Ranking** (order or prioritize a list of options)
- ◆ **Open-ended/text entry**



The Value of Open-Ended Questions

Open-ended questions, which invite respondents to submit written responses, can play an important role in a survey: inviting the unexpected.

For example, early in the pandemic, an open-ended question alerted North Carolina officials to the challenges that some communities faced in distributing food to families in need. Existing systems were not designed to handle such a large-scale crisis, McGarrah said.

Traditional survey questions make assumptions about what's important to ask and even what the possible answers are. "If you don't give [respondents] the opportunity to answer open-ended questions, you might be making the wrong assumptions," she said.

Open-ended questions can solicit a range of responses. They include:

- ◆ **A word or two** (often factual, such as birthplace)
- ◆ **A short sentence** ("In just a few words...")
- ◆ **Multiple sentences** ("In your own words...")

A pitfall of open-ended questions is that the responses are not always helpful. "Sometimes they'll talk to you about things that are not exactly what you're looking for and that are not clearly related to the topic at hand," McGarrah said.

Note:

Not everyone will answer an open-ended question. According to a [Pew Research Center study](#), which conducts national surveys, nonresponse rates for questions asking for a single word or a detailed response ranged from 4% to 25%, with a median of 13%.



Tip: Be Honest About the Time Required

Before fielding a survey, test how long it takes and let people know up front.

Two factors determine the length of a survey: the number of questions and their complexity. A survey with 15 multiple-choice questions could take five minutes or less, while one with 10 multiple-choice and three open-ended questions could take at least 15 minutes.

“I really don’t like it when somebody tells me it’ll take longer than, say, five or 10 minutes,” McGarrah said. “I’m very unlikely to click on it, or I get into it and it’s taking me much longer than what people said it would take.” NCPRO surveys typically ask 15 questions and take three to five minutes to complete, she said.

Researchers say that if surveys take too long, one of two things happen: People drop off midway through, leading to a low completion rate, or they spend less time thinking about their answers. Either way, the quality of your data will suffer.



Recommended Resource:

The Pew Research Center wrote a [detailed blog post](#) explaining its approach to determining survey length.



Focus Groups: A Way to Dig Deeper

A community survey might answer some questions but raise others, either because the results need more context or they suggest a whole new line of questioning. When that happens, one option is a focus group.

The idea is to bring together a sampling of constituents or community leaders to explore issues in greater depth.

For example, respondents to one North Carolina survey expressed frustration with spotty internet access, Kinkade said, even though state-level data showed great coverage statewide. Subsequent focus group discussions found the quality of connectivity in some regions varied widely for residents living outside downtown areas.

When inviting people to join a focus group, be clear about its purpose and its value, Kinkade said.

“Give them a sense that this isn’t just an abstract thing,” he said. “Let them know, ‘What are we doing with this data? How is this helping the state? How is this helping you?’”

Cyber Resiliency Supports Strong CX

An interview with Michael Carroll, Vice President of Sales - US SLED at Commvault, and David Rubal, CISSP, NREMT, Senior Technical Business Development Manager for U.S. DOD, Hybrid Cloud and Edge Computing Services, AWS

To support outstanding constituent experiences, government agencies need cyber resiliency, the capacity to bounce back quickly in the face of setbacks.

Resiliency encompasses an agency's people, processes and technology, with an underlying focus on safeguarding information related to the customer experience (CX), said Michael Carroll, with Commvault, which helps agencies secure and recover data in the face of ransomware and other threats.

"Resiliency is not a point in time, nor is it a thing. It reaches all aspects of agency [operations]. It affects the users of an agency's services, [and] it affects the strategy of an agency short and long term," added David Rubal, of AWS, a cloud-computing provider. And data management and protection play a role like never before.

Challenges to Resiliency

Among agencies' foremost challenges is the sheer complexity of the technological landscape. Organizations depend on a wide array of tools to support CX, and more tools create more attack vectors. The difficulty lies in assembling those tools into something meaningful as it pertains to an enterprise security strategy, Rubal said.

The interdependence of data and applications also is a problem, along with the expanding geography of the IT ecosystem — "the concept of applications living in multiple places at once," said Carroll. There are excellent reasons to move applications to the cloud, but often data protection strategies and postures don't follow, "which makes it very difficult to protect, recover, restore and be resilient," he said.

"Really the biggest challenge," Carroll continued, "is being able to have a unifying strategy across the organization [that allows you] to be cyber resilient."

A Way Forward

A cloud-based resiliency platform can ensure rapid recovery after an event, which is the hallmark of effective cyber resilience. Such an approach will leverage modern capabilities to deliver early warning, threat detection, incident readiness, rapid response and cyber recovery. Agencies can enjoy the benefits of cloud technology while maintaining their security posture — what Carroll called "modernize without sacrifice."

A solution such as Commvault's cloud platform also helps to overcome problematic IT fragmentation and encourages flexibility "across public cloud, across [on-premises] and SaaS applications, without having to manage or utilize multiple different tool sets," he said.

A typical organization could have anywhere between five and seven different technologies that are used for backup, recovery and restore. A solution like Commvault's cloud platform can consolidate those different applications, he added.

In addition, zero-trust architecture delivers role-based access, while AI-driven, proactive threat detection ensures agencies have a means to support rapid recovery.

"Commvault and AWS are key solution partners," said Rubal. "We've demonstrated the capabilities that we can jointly provide together in this cloud-forward environment, to achieve modern data management objectives and help customers get to where they need to be."



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A Digital Forms Checklist

Moving forms online can streamline internal processes, generate usable data for evaluating programs and make it easier for the public to access the resources they need. But just copying your existing paper forms to a website isn't enough.

The benefits of digitizing forms include “reducing the workloads of individual staff, streamlining processes [and] reducing cost,” said Hollie Bodiford-Taylor at a [GovLoop CX CoP](#) earlier this year. She's a Senior Technology Adviser and Program Manager for IT Strategy at the Food and Drug Administration's Office of Laboratory Safety.

To learn how to make forms that improve CX, we've assembled tips from:

- ◆ **Hollie Bodiford-Taylor**, Senior Technology Advisor/Program Manager for IT Strategy at the FDA
- ◆ Former GovLoop Featured Contributor **Greg Jordan-Detamore**, Associate Director for Human-Centered Government at Code for America
- ◆ Former GovLoop Featured Contributor **Elizabeth Slack**, Grants Manager in Sponsored Research Administration at Florida State University

Designing Your Online Forms

- ❑ **Question Everything.** “Redesigning forms is an underappreciated way to reduce administrative burden and paperwork,” Slack said. Is the information the form asks for still needed? Does it ask for all the required confirmations and approvals?
- ❑ **Use Plain Language.** Plain language is communication your audience can understand the first time they read or hear it, according to [plainlanguage.gov](#). That means commonly used words, no jargon and a comfortable reading level. “Aim for a level no higher than eighth grade — and if you can get it down to sixth or even fifth, that would be ideal,” said Jordan-Detamore.
- ❑ **Provide Forms in Multiple Languages.** What languages do your constituents use? The forms should be available in as many as possible. And don't skip on the translation — Google Translate is not good enough. Hire a fluent speaker.
- ❑ **Reduce Open-Answer Fields.** Where possible, use drop-down choices or defined fields, such as blanks that accept only numbers, to limit the variation of answers on your forms. “Creating fields that are standardized is really encouraged,” Bodiford-Taylor said.
- ❑ **Get Feedback.** Ask the people who use the forms for their opinions and ideas before designing. Let them review the new form to make sure they understand it. Good CX incorporates customer perspectives.



Deploying Your Online Forms

- ❑ **Make the Best Use of Technology.** For example, set up your form so users don't see questions they don't need to answer. If they've selected "no," turn off follow-up fields. Have the form verify their name against your constituent database to confirm it's the same person.
- ❑ **Make Your Websites Mobile-Friendly.** According to a 2024 Pew Research [report](#), "15% of U.S. adults are 'smartphone-only' internet users — meaning they own a smartphone, but do not have home broadband service." People who are younger and have lower incomes and less education are even more dependent on mobile phones for internet connections, so it's imperative that your forms work on phones as well as desktop computers.
- ❑ **Check Your Website's Accessibility.** Some of the easier accessibility targets include keyboard navigation, support for screen readers and color contrast. Be sure to include alternative text for screen readers and descriptive text for hyperlinks. If your form is a PDF, make it an [accessible](#) one.

Managing Your Online Forms

A common mistake with form development is not planning for what happens to the digital forms after they're submitted. Keeping form data organized and secure goes a long way toward building public trust.

Online forms can be the first step toward digital workflows — where the document moves through its process on a secure pathway that logs each interaction and flags changes. But even if your agency isn't ready for that full transformation, there are some important steps to take.

- ❑ **Reduce Silos to Reduce Duplication.** If the form is duplicated at every step of its journey, it can be hard to know if the copy in hand is the final one and whether it has been through all necessary steps. "You don't want to have to go to multiple systems because the information is in multiple different places," said Bodiford-Taylor.
- ❑ **Designate a Central Version.** "Focus on [having] a central bellybutton as the source of information," she advised. "Have a communications plan that clearly states which digital forms are the ones of record." She recommended having a centrally available version of the document, for instance on Microsoft SharePoint, that all users can access.
- ❑ **Protect Sensitive Information.** "The data that's collected may contain sensitive information, personally identifiable information or other things you don't want exposed to the world," Bodiford-Taylor said. "You don't want to have a lot of information floating around out there in different spaces."

Worksheet: Putting Human-Centered Design Into Practice



Human-centered design (HCD) vastly improves CX at your agency. But when you're creating new processes, HCD is easy to overlook. Earlier this year, GovLoop hosted a [CX CoP](#) regarding HCD with Jonathan Rubin, User Research Team Lead at the Consumer Financial Protection Bureau. The following worksheet is based on wisdom and opportunities he shared during the session.

“Human-centered design (HCD) is a qualitative research method that helps groups solve problems and seek solutions that prioritize customer needs over a system’s needs.”

– [Digital.gov](#)

What does HCD mean to you or your team?

CoP attendees said:



“Human experience brings empathy to CX.”



“I try to imagine my mother or my grandmother using or performing this task.”



“It’s a vision for how something, like a process, a program, a website, or a product, will be perceived and used in the real world.”



“It’s both a mindset and a skill.”

How You Serve

Regarding a specific service your agency provides, please describe the following:

What does it require of your end user(s)?

What is the impact your solution has on a real-world problem?

True or False?

User experience (UX) and CX are the same.

False! They are similar — both use interviews, usability tests and surveys for evaluation, for example — but there are differences. While UX relates to someone's interaction with a specific product or platform, CX concerns the entire customer or constituent experience across multiple products or platforms.

Name some UX elements at your agency, and then describe the CX they create:

True or False?

Designing technology so that people can use it easily is both ethical and strategic for an agency.

True! HCD is cost effective and improves operations.

Describe how your agency's operations might improve with better HCD:



True or False?

Quantitative data — information that you can measure and count — shows everything you must know about what people are experiencing and why.

False! Quantitative data typically reaches a point where it can't teach you anything more. To delve into the "why," you also need **qualitative data** — derived from interviews and focus groups, for instance — to provide insight into what the quantitative numbers mean.

What kind of qualitative data are you collecting or planning to collect?
What might it show you?

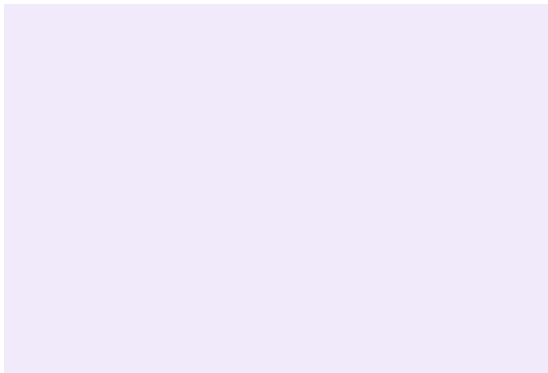


True or False?

Online accessibility is part of the Americans with Disabilities Act (ADA).

True! In April 2024, a final rule was added under ADA's Title II to guarantee that disabled persons can fully access web content and mobile applications. The rule applies to federal, state and local government agencies.

Describe how your agency's online tools have grown or will grow to meet this requirement:

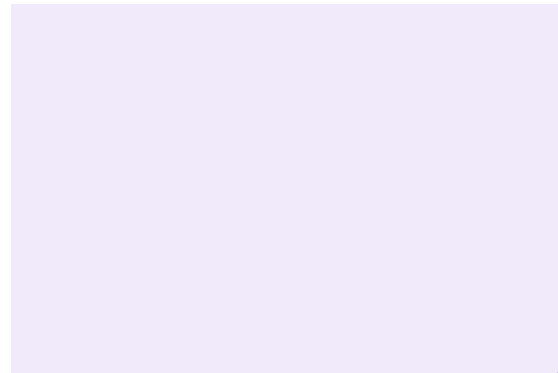


True or False?

If you have a great digital system, you don't need a manual or person-based channel.

False! Although digital options grow and improve every day, agencies still must serve those who don't use smartphones or even computers. Remember that some constituents do not have email accounts. Focusing on a person's experience means understanding where and how they may live.

How does your agency work with people who have limited digital capabilities?

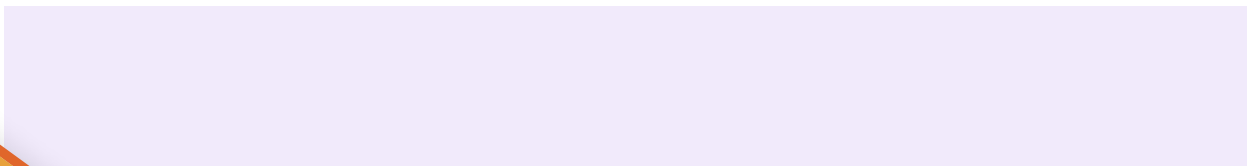


True or False?

Creators consist chiefly of engineers, architects and visual designers.

False! We are all creators. We all create and design interactions between people, data and events, setting up experiences for users, either immediately or in the future.

Describe your role as a creator:



Conclusion

No matter your specific job function, CX lies at the heart of what you do. But knowing that government should provide helpful, timely and accessible services and actually delivering them are different issues.

In this guide — the first of our 2024 two-part CX series — we offer concrete ways to improve your agency’s customer experience. Case studies, technology insights and how-to guidance in the form of tipsheets and best practices will help you transition from thinking about CX to doing CX well.

Our next CX guide will explore what’s ahead in 2025 — offering a blueprint, of sorts, so you can meet and perhaps exceed the public’s expectations. Pre-register to receive the next guide [here](#).

Thank You

Thank you to AWS, Commvault and Granicus for their support of this valuable resource for public-sector professionals.

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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Susan Kirby-Smith, Senior Staff Writer
Candace Thorson, Managing Editor
John Monroe, Director of Content
Lauren Walker, Senior Staff Writer

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