

Your Road Map for Providing a Better Constituent Journey

The constituent experience (CX) is a critical part of building trust with the public. People often talk about the importance of improving CX, and making it easier to deliver high-quality services without having to jump through so many administrative hoops. But these discussions often lack specifics. How does an organization get there?

Read on for best practices and insights into optimizing your constituent journey.

Constituent-Ready Websites and Digital Services: A Checklist

Providing a good CX begins by addressing seemingly mundane details as you design a website or digital service. Delivering a Digital-First Public Experience, a memo issued by the U.S. Office of Management and Budget (OMB) in September 2023, has some guidelines.



Is the website or digital service inherently accessible to people of diverse abilities?

To the greatest extent possible, a website or digital service should be usable by all people who need adaptation or specialized design.

Key resources: Section 508 of the Rehabilitation Act of 1973 and the Web Content Accessibility Guidelines, published by the World Wide Web Consortium



Does it align with the visual design of your agency's other services?

A consistent look and feel helps establish your agency's brand identity, which is critical to setting it apart from nongovernment entities and building trust with your constituents.

Key resource: The U.S. Web Design System



Is the content authoritative and easy to understand?

It's not enough to have up-to-date, accurate information. It also must be clear and easy to follow. Otherwise, constituents could get frustrated, fail to follow directions and lose trust in your services.

Key resource: [Federal plain language guidelines](#)



Is the design user-centered and data-driven?

A good design process uses both qualitative and quantitative research to identify end users' interests and requirements, including surveys, focus groups, usability testing and website analytics.

Key resource: Digital.gov's [user-centered design topic page](#)



Does it follow security practices from front to back?

The new terms of art are secure by design and secure by default. This means incorporating zero-trust principles, encrypting data in transit, providing secure and usable authentication, and so on.

Key resource: The [Secure by Design](#) guidelines provided by the Cybersecurity and Infrastructure Security Agency



Is your information or service easily discoverable through search?

Most people will find your information or service through search, not by going directly to your website, which means you need to follow standard search engine optimization (SEO) practices.

Key resource: Digital.gov's [SEO explainer](#)



Does the design work across devices of varying sizes?

Test to ensure that users can access and navigate your website or service with equal ease whether they are using a laptop, smartphone or tablet (or anything in between).

Key resource: Interaction Design Foundation's [Mobile First topic page](#)



Can constituents customize their digital experience?

Give users a way to tailor information or services to align with their preferences — that is, the ability to select how information is presented (e.g., list vs. tiles), to pre-populate or filter data, and to communicate across different channels (web, social media, phone, etc.).

Key resource: Digital.gov's [Requirements for Delivering a Digital-First Public Experience](#)

Best Practices in Digital Forms and Services

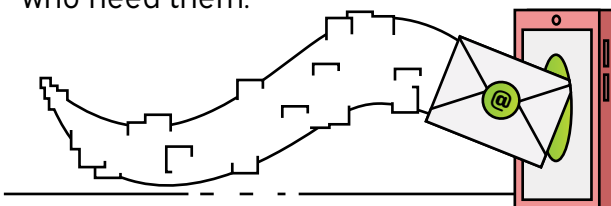
Digitization has dual benefits: For constituents, digital forms or services are easier to access, and for agency staff, they are easier to administer. Here are some basic digitization guidelines from OMB.

Forms

- + Prioritize providing digital options for forms that directly support the delivery of services or benefits that have the greatest public impact.
- + When revising forms that have both digital and paper versions, design the digital form first and then use it as a template for the new paper form.
- + Design forms to be easily revisable.
- + Wherever possible, use an existing digital form as a template for a new one, rather than building from scratch every time.
- + Don't convert information you collect via a digital form to another format.

Services

- + Wherever possible, provide self-service options for common, straightforward services.
- + For each service, determine the most appropriate channels – web applications, mobile applications, chat, email, etc. – for the intended constituents or user group(s).
- + Ensure that users have a seamless experience as they move among channels.
- + Maintain non-digital options, including in-person, postal mail or phone, for people who need them.



Signatures

- + Accept electronic signatures wherever possible but ensure the electronic signature and signing process satisfy all legal and security requirements.
- + Don't require a signature or identity verification for a form or service if it's not necessary.
- + If it is necessary, don't ask for more information than absolutely needed and, if feasible, provide a digital alternative method.
- + To the greatest extent possible, offer constituents both traditional and digital channels for every form or service.
- + Remember that signatures alone cannot prove an end user's identity. For forms or services that require greater assurance, use an identity verification/proofing or non-repudiation solution.

Where Are Your Experts?

To develop good digital services, you need to assemble a multidisciplinary team, according to OMB. Potential roles include:

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| • Product managers | • Behavioral scientists |
| • Front-end developers | • Data analysts |
| • Software engineers | • Accessibility specialists |
| • User experience researchers and designers | • Privacy specialists |
| | • Content designers and copywriters |

Enterprise Content Management: Overcome Obstacles to Better CX

The journey to a better CX is not easy. Even if you follow every best practice, you'll still face obstacles resulting from decades of manual, paper-based processes. This is where an enterprise content management (ECM) platform can help. Beyond just storing and managing access to critical records and documents, you can convert that information into intelligence.

Consider the following use cases:

1. Connecting Physical and Digital Content

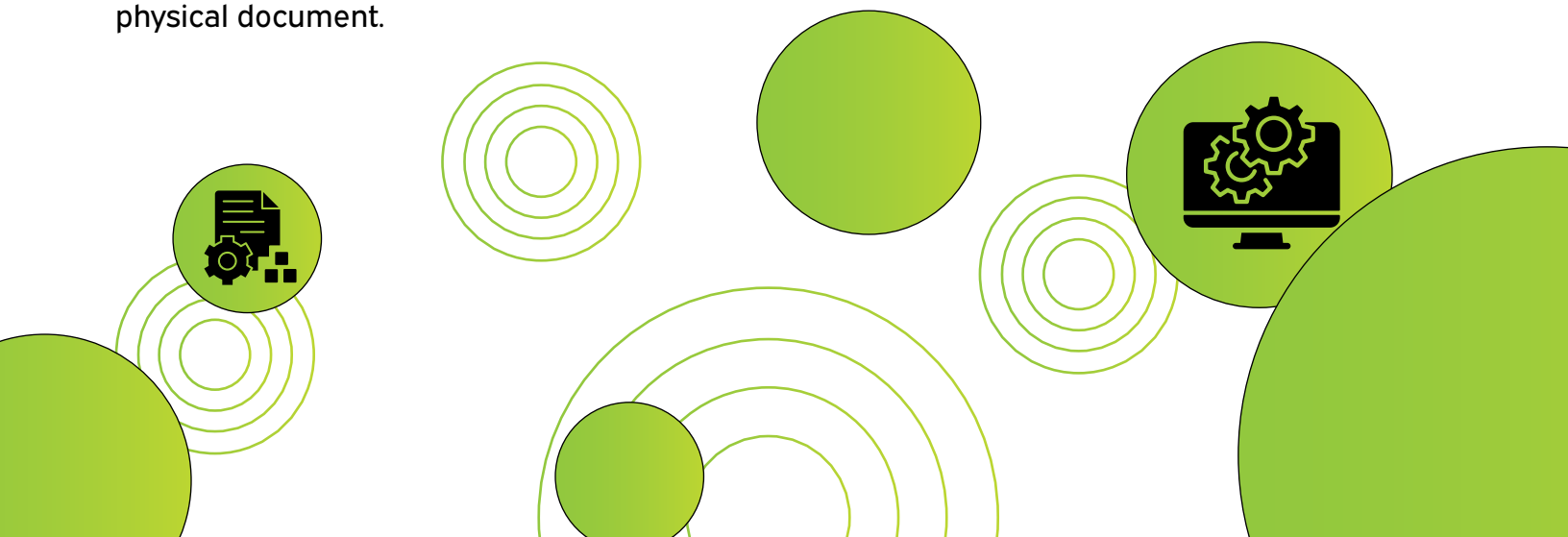
● **The challenge:** Agencies still collect vast volumes of information via paper forms. That slows the constituent journey, creates time-consuming processes and burdens government workers who are capturing and analyzing the information. But even if they digitize those forms, laws or regulations might require agencies to retain the physical documents, creating a document discovery nightmare.

● **The solution:** To move forward, agencies need an ECM system that connects physical and digital content. The idea is to retain physical documents for records-retention compliance and digital documents for discovery purposes — and to map the digital document to the location of the physical document.

2. Simplifying Data Access

● **The challenge:** Fragmented information systems add to the administrative burden and frustrate constituents. When agency staffers need to bounce among multiple technology solutions to access information, it slows service delivery. And it raises critical questions: How is the data updated and how frequently? Is it accurate?

● **The solution:** A modern ECM can serve as an organizationwide backbone for content and records. Agencies can streamline service delivery, using a single solution to collect and store data. Also, by connecting that solution to a constituent relationship management system, you can get a holistic view of that constituent, patient or student.



3. Delivering 24/7 Services

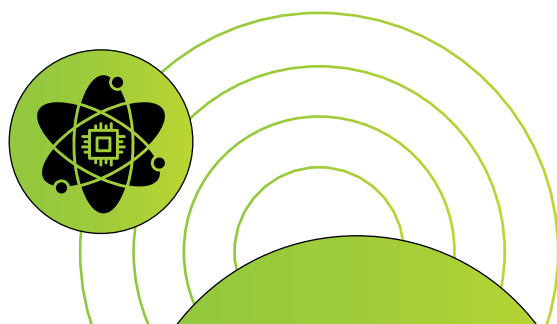
● **The challenge:** Manual, paper-based processes are not just inefficient. They also limit an agency's ability to make services available to constituents when they need them. For instance, if someone is looking for information or has a question about a form outside business hours, there might be no one available to help.

● **The solution:** With digital forms based on an ECM platform, people can access data and processes anywhere at any time, with an option for real-time translations. Forms become more than just electronic versions of paper documents: They can include tools that support access for people who have vision, auditory or cognitive impairments. The use of digital forms also provides the agency with near-real-time reporting.

4. Leveraging AI

● **The challenge:** AI can transform CX and reduce administrative burden. First, however, organizations must make data more readily available and integrate AI into existing systems.

● **The solution:** A modern ECM can accelerate an agency's AI journey, giving it the means to train AI applications on consistent, reliable data. With the right permissions in place, digital assistants can then access that data to provide answers in real time, simplifying interactions with the public and easing the burden on staff members.



How Laserfiche Helps

Laserfiche's ECM platform, with cloud, on-premises and hybrid deployment models, provides several key capabilities to help agencies deliver better services with less administrative burden. They include:

- + **Laserfiche Forms**, which are digital documents that agencies can scan or query to surface needed information
- + **Laserfiche AI**, with document summarization, optical character recognition (OCR) and handwriting recognition built into the platform
- + **Laserfiche Integrations**, which help agencies synchronize data across systems and improve operational workflows

Learn more [here](#).



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