SUMMER of CX webinar series

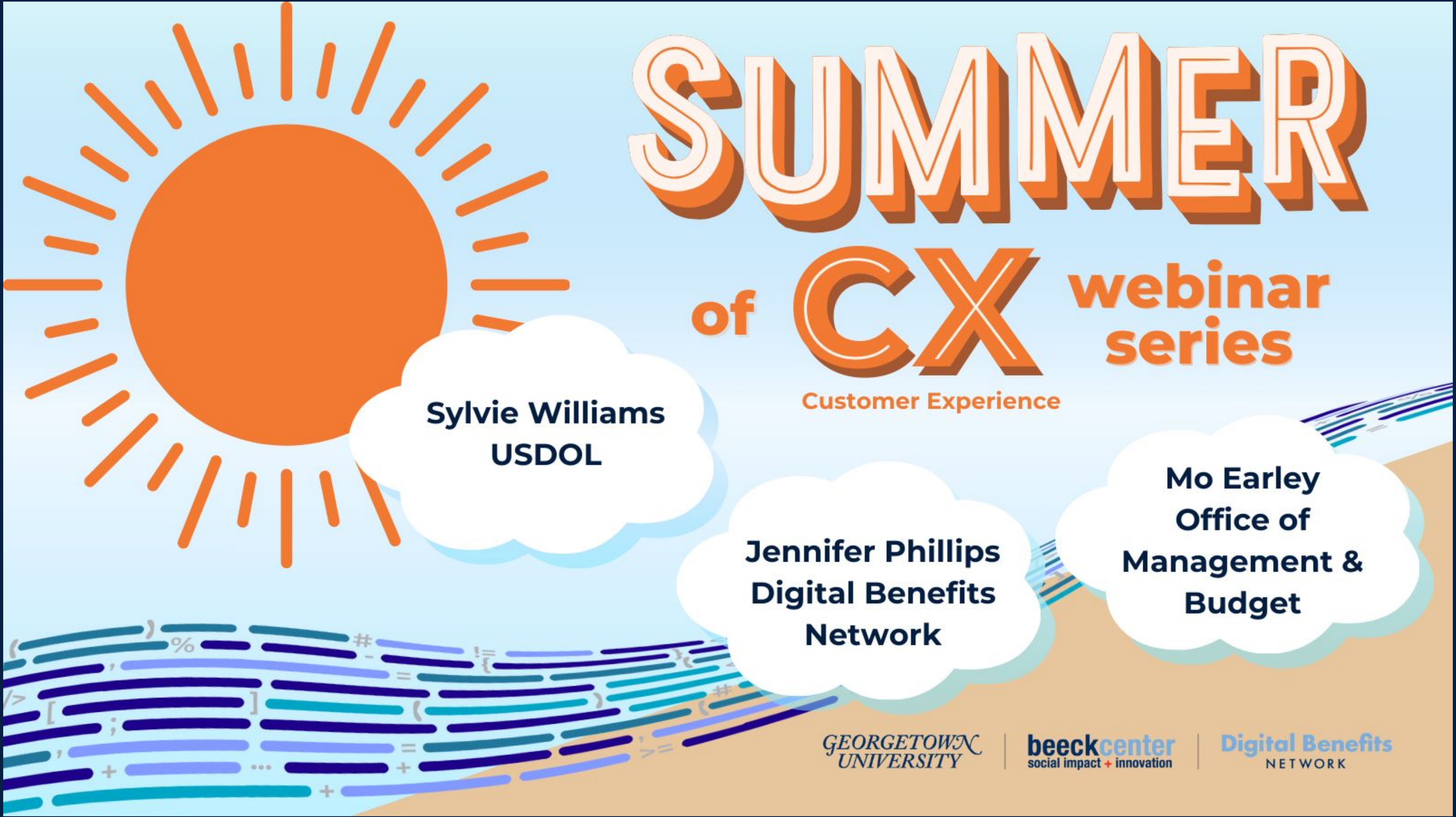
Customer Experience

Principles to Improve CX
July 15

CX Metrics for Decision Making
Aug 6

Improving CX for Benefit Access
Aug 14

GEORGETOWN UNIVERSITY | beeckcenter social impact + innovation | Digital Benefits NETWORK


SUMMER
of CX webinar series
Customer Experience
Sylvie Williams
USDOL
Jennifer Phillips
Digital Benefits
Network
Mo Earley
Office of
Management &
Budget
GEORGETOWN UNIVERSITY
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NETWORK

Webinar Community Norms

Please note this event will be recorded.

(Transcription and slides will be available)

Use raise hand function to ask questions during Q&A or drop them in the chat.

Please stay on mute unless you're presenting or asking a question during Q&A.

Be kind in the chat and respectful in your communication.

Join the Digital Benefits Network!

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The Digital Benefits Network supports government in delivering public benefits services and technology that are accessible, effective, and equitable in order to ultimately increase economic opportunity.

SNAP | WIC | Medicaid/CHIP | TANF | Basic Income | UI | Child Care

Ecosystem Coordination

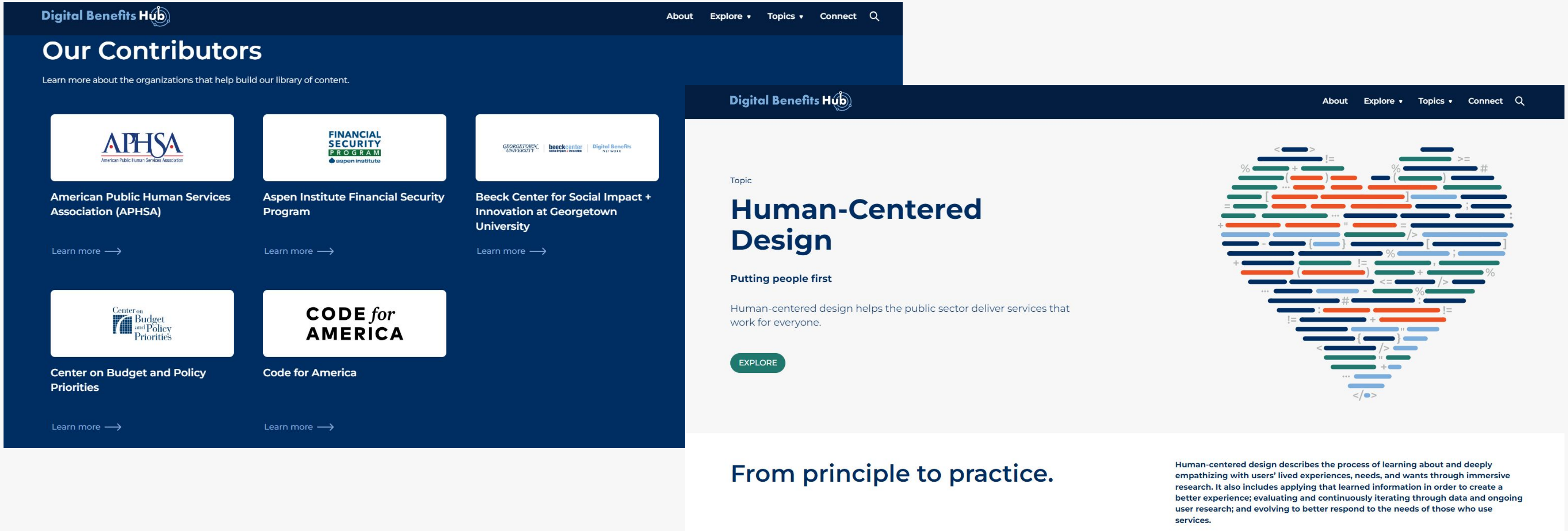
Curation of Info & Tools

Actionable Research & Resources

Peer Communities of Practice

Learning & Futures

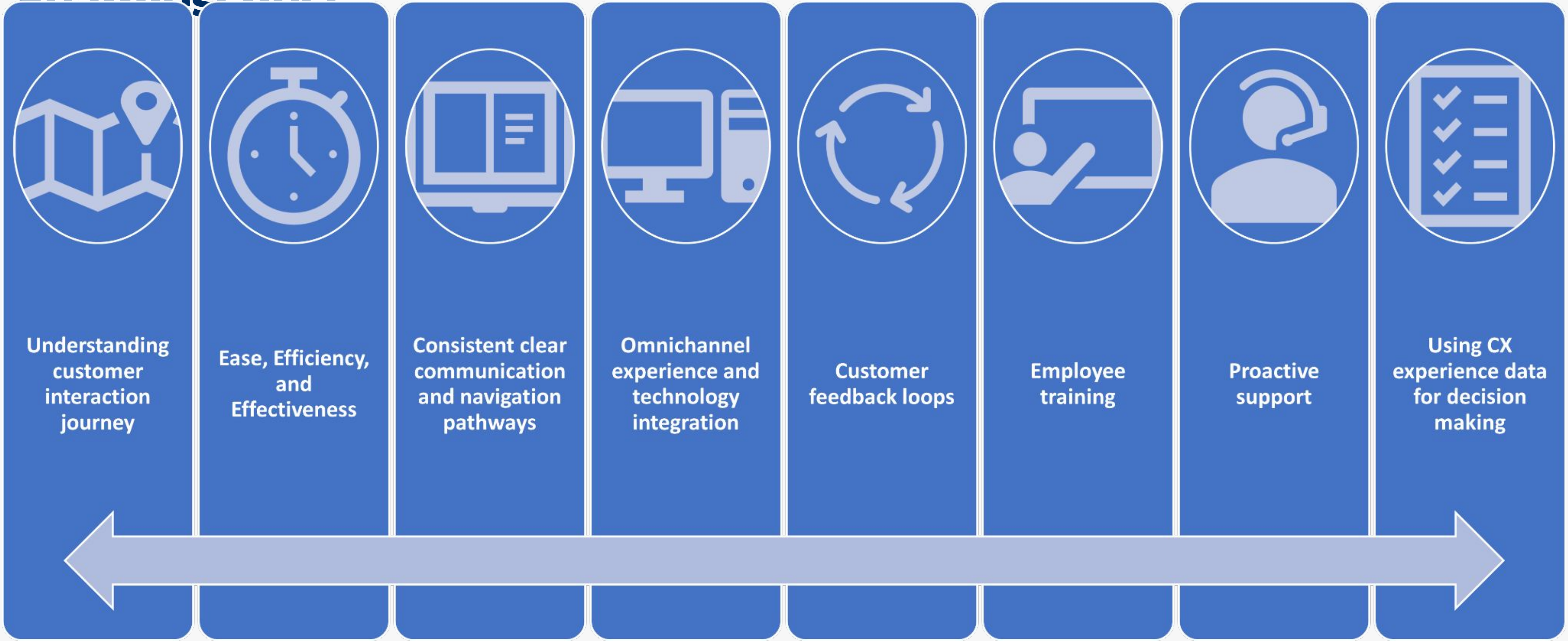
Organizations Helping Bring Attention and Resources to State Customer Experience Work



Webinar 1: Principles to Improve CX Quick Recap!

- Understand pain points
- Create feedback loops
- Define and measure CX metrics

CX Principles: Personalization, Consistency, Seamlessness



Examples of CX Metrics for Decision Making

- Ease of navigation
- Ease of overall use
- Time to apply
- Overall satisfaction
- Abandonment rate
- Click-through rate
- Error rate + accuracy
- Average resolution time

BY THE PEOPLE
FOR THE PEOPLE
WITH THE PEOPLE

OMB Federal CX Team

August 2024

CX Metrics Overview

“We have to prove democracy still works, that our government still works and can deliver for our people.”

President Biden
April 28, 2021, in his first joint address to Congress

Federal CX Framework

OMB Circular A-11, Section 280 *Revised Aug. 2024*	**Executive Order 14058** *Signed Dec. 13, 2021*	**President's Management Agenda, Priority 2** *Released Nov. 18, 2021*	**21st Century Integrated Digital Experience Act** *Signed Dec. 20, 2018*
Managing Customer Experience and Improving Service Delivery	Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government	Delivering Excellent, Equitable, and Secure Federal Services and Customer Experience	Improve the digital experience for government customers and reinforce existing requirements for Federal public websites
Provides more detailed guidance on implementing the CX EO and on CX management in the Federal context. Identifies High Impact Service Provider (HISP) programs and outlines annual requirements and best practices as part of budget, learning, and strategic planning efforts.	*"It is the policy of the United States that, in a Government of the people, by the people, and for the people, improving service delivery and customer experience should be fundamental priorities."*	*"Every interaction between the Government and the public is an opportunity to deliver the value and competency Americans expect and deserve."*	*"Any website of an executive agency that is made available to the public after the date of enactment of this Act shall be in compliance with the website standards of the Technology Transformation Services"*

Federal CX Framework: Focus on A-11 280

OMB Circular A-11, Section 280 *Revised Aug. 2024*	Executive Order 14058 *Signed Dec. 13, 2021*	President's Management Agenda, Priority 2 *Released Nov. 18, 2021*	21st Century Integrated Digital Experience Act *Signed Dec. 20, 2018*
Managing Customer Experience and Improving Service Delivery	Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government	Delivering Excellent, Equitable, and Secure Federal Services and Customer Experience	Improve the digital experience for government customers and reinforce existing requirements for Federal public websites
*Provides more **detailed guidance on implementing** the CX EO and on CX management in the Federal context. Identifies High Impact Service Provider (HISP) programs and **outlines annual requirements and best practices** as part of budget, learning, and strategic planning efforts.*	*"It is the policy of the United States that, in a Government of the people, by the people, and for the people, improving service delivery and customer experience should be fundamental priorities."*	*"Every interaction between the Government and the public is an opportunity to deliver the value and competency Americans expect and deserve."*	*"Any website of an executive agency that is made available to the public after the date of enactment of this Act shall be in compliance with the website standards of the Technology Transformation Services"*

A-11 280 outlines key activities, best practices for CX measures

SECTION 280—MANAGING CUSTOMER EXPERIENCE AND IMPROVING SERVICE DELIVERY

SECTION 280 – MANAGING CUSTOMER EXPERIENCE AND IMPROVING SERVICE DELIVERY

Table of Contents

[Office of Management and Budget Circular A-11 Section 280]

"Measures of experience are of co-equal importance as traditional measures of financial and operational performance…

…This document outlines an accountability framework to deliver [on these components]."

Metrics and data are mentioned throughout A-11 280:

280.5 – Collecting metrics to analyze digital services

280.7 – Framework for managing customer experience, including measurement

280.9 – How to know services are working and delivering value for the public (customer research, user feedback, post-transaction feedback data collection, data-driven decision-making, voice of the customer programs)

280.10 – Linking CX and larger strategic plans, documents, goals

280.14 – Making measures transparent and public to build trust

A-11 280 encourages a comprehensive metrics picture

★ *280.5 – Metrics to analyze digital services*

- ✔ Use a **digital analytics program** (such as GSA's DAP, Google Analytics, etc.) to capture data from customer actions, such as button and link clicks, page views, and transactions
- ✔ **Attach timestamps to data points** to trace user journeys and analyze behaviors over time
- ✔ **Collect web data** in a structure/format that makes quantitative analysis possible
- ✔ Build, update, and use **digital analytics data dashboards and visualizations** for decision-making

280.7 – Measuring customer experience

Measurement is one of several core functions of managing CX (among Governance and Strategy, Culture and Organization, Customer Understanding, Service Design and Improvement). Organizations should:

- ✔ ★ **Define and institute CX outcome measures**, as well as **service operational measures**, to ensure accountability for improving service delivery
- ✔ Use this data to **communicate performance across the organization** and **to the public**
- ✔ **Routinely analyze** and make use of this data for decision-making

280.9 – How do we know if services are working?

- ✔ ★ **Structured and unstructured customer research** (e.g., surveys, focus groups, customer observations, social media reviews, etc.)
- ✔ **User feedback activities** (e.g., prototypes, A/B testing, customers reacting to plain language rewrites)
- ✔ **Post-transaction feedback** (e.g., surveys occurring generally within 48 hours after the service interaction occurs)
- ✔ **Data-driven decision-making, goal setting, and strategic planning** (e.g., leadership using administrative, systems, digital analytics, post-transaction feedback, etc.)

280.10 – CX in Annual Performance Plans

Annual Performance Plans should include indicators for **outcomes related to customer experience and relevant service levels** appropriate to their program, including:

- ✔ **Customer feedback data** ★
- ✔ **Service level indicators** (e.g., wait times, website analytics, etc.)

A-11 280 encourages a comprehensive metrics picture

280.5 – Metrics to analyze digital services

Organizations can use information that tells a story about how customers are using their services – including data already being collected!

(Build the pipes)

- ✔ Use a **digital analytics program** ... ata from custom...
- ✔ ... yze
- ✔ C... quantitative ar...
- ✔ Bu... update, and use **digital analytics data dashboards and visualizations** for decision-making

280.7 – Measuring customer experience

Organizations can analyze and act on information they are collecting about their services

(Turn the faucets on and off)

Measurement is one of several core ... ng Governance and St... Un... uld:

- ✔ D... o... ce de...
- ✔ Us... formance across the organization an...
- ✔ **Routinely analyze** and make use of this data for decision-making

280.9 – How do we know if services are ...?

Organizations can ask customers for feedback about their services

(Is the water too hot? Too cold? Right pressure?)

- ✔ **Structured and unstru...** ... cus grou...
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- ✔ Po... within 48...
- ✔ **Dat... decision-making, goal setting, and strategic planning** (e.g., leadership using administrative, systems, digital analytics, post-transaction feedback, etc.)

280.10 – CX in Annual Perform...

Organizations set goals and track progress towards achieving those goals

(Check the water bill)

Annual Performance ... **rel...** ... ate to t...

- ✔ C...
- ✔ Se... alytics, etc.)

A-11 280 encourages a comprehensive metrics picture

★ 280.5 – Metrics to analyze digital services

- Use a **digital analytics program** (... ata from custome ... ,
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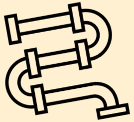

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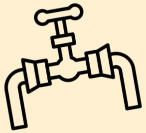

(Turn the faucets on and off)

280.9 – How do we know if services ar ... ?

- **Structured and unstr** ... cus gro ...
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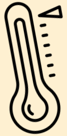


(Is the water too hot? Too cold? Right pressure?)

280.10 – CX in Annual Perform ...

Annual Performance ... **rel** ... ate to t ...

- C ...
- **Se** ... alytics, etc.)

(Check the water bill)

HISPs are required to collect post-transaction feedback data

HISP customer feedback surveys must include:

Q1 Required Wording: I trust [Agency X] to deliver on its [mission Y] to the [American public/customer group Z].

Depending on the service and transaction context, other iterations of wording for this question could include sentences such as:

- *Based on my experience calling the IRS, I trust IRS is working in the best interest of the American public.*
- *Having completed the FAFSA, I trust FSA to deliver on its responsibility to students.*
- *Based on my passenger screening experience, I trust that TSA is providing a safe and secure experience for the traveling public.*

If a HISP proposes to use a Likert scale (e.g., for 5 points – strongly agree, agree, neutral, disagree, strongly disagree), rather than a binary thumbs up/down response for a respondent's agreement with the Q1 statement, the adapted wording and scale will be reviewed as part of the PRA approval process. Please note that if a HISP does employ a Likert scale, OMB will work with them to understand whether and how different ratings (e.g., 3, 4, and/or 5 out of 5) will be accounted for in OMB's overall trust calculations to be incorporated in the percentage of respondents that responded in the affirmative on trust in OMB data visualizations and public reporting.

If respondent provides "thumbs up" or the highest Likert scale rating (e.g., 5):

Q2a Required Wording: What about this interaction made the difference? *(Tap/Select all that apply)*

	Driver Category *(Not shown)*	**Corresponding Statement** *(HISPs may choose one statement per driver category to be shown in a multiple-selection question format; HISPs may modify example statements to align to specific contexts/services.)*	**Status**
1	*Effectiveness*	My need was addressed. My issue was resolved. I found what I needed. My question was answered. I successfully completed [service/task]. *(Or similar.)*	Required
2	*Ease*	It was easy to complete [the task/service/what I needed to do]. It was easy to find what I needed. *(Or similar.)*	Required
3	*Efficiency*	It took a reasonable amount of time to do [the task/service/what I needed to do]. I found what I needed on the site quickly. *(Or similar.)*	Required
4	*Transparency*	I understand what was being asked of me throughout the [task/service/process]. I understand the reason for the [Agency/Program/service]'s decision. *(Or similar.)*	Required if applicable
5	*Humanity*	I was treated fairly. *(Or similar.)*	Required if applicable
6	*Employee Interaction*	Employees I interacted with were helpful. The [employee/call center representative/etc.] was committed to [solving my problem/answering my questions/etc.]. *(Or similar.)*	Required if applicable
7	*Other*	Something else. None of the above. *(Or similar).)*	If applicable

HISPs are encouraged to the extent possible to simplify statements to 1-3-word clauses and use iconography as relevant.

Q3 Required Wording: Anything else you want us to know about your experience? *(Or similar.)*

[Free text response]
May be excluded if the format/delivery channel of the survey, such as an interactive voice response (IVR) or telephone-based survey, does not capture and transcribe the voice recording.

Public data dashboard: https://www.performance.gov/cx/data/

CX Customer Feedback Dashboard

Feedback Data Explainer

Trust in Major Government Service Providers

Every interaction between the government and the public is an opportunity to build trust—and that's why we measure it.

The American public expects and deserves effective, equitable, and accountable government service delivery—and customer feedback helps us know how well we are meeting our goals.

All High Impact Service Providers are required to collect customer feedback to better understand how individual interactions with services drive trust in government.

We share this customer feedback data publicly to build accountability and transparency into everything we do, and to demonstrate continuous improvement.

BOTTOM LINE UP FRONT

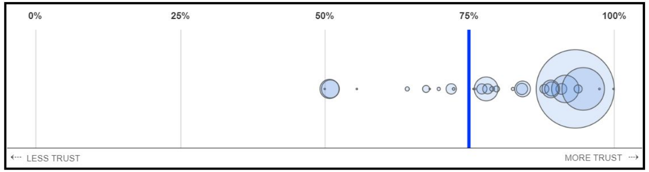
From **January-March 2024**, we asked **288,274** customers of major government services whether they trusted the agencies involved to meet public needs. For **23** out of **33** services, a significant majority—at least 75% of people who responded—said they trusted the relevant agency.*

Understanding trust in Government

SERVICES BY % OF CUSTOMERS WHO REPORTED FEELING TRUST

Highlight Service

Each circle is a service provided by the Federal government. The size of a circle corresponds to the number of survey responses.



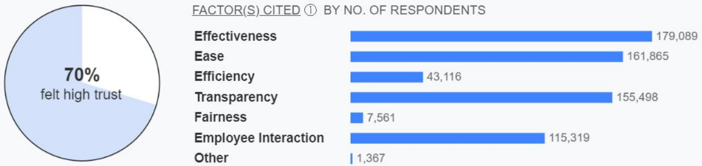
* Customers could show trust with a thumbs-up or by rating 4 or 5 on a 5-point Likert scale. Agencies customized their surveys to use one of these two methods.

Review Survey Prompts

For customers who gave the highest ratings for trust—either a thumbs-up or a 5 out of 5—we asked what made their experience great. For all other responses, we asked what could be improved.

What factors drove trust?

202,722 customers **gave the highest rating for trust**



85,552 customers **said there was room to improve**

High Impact Service Providers – a wide range of services!

Department of Agriculture
1. Farm Service Agency
2. Food and Nutrition Service
3. Forest Service
4. Natural Resources Conservation Service
5. Rural Development

Department of Commerce
6. Census
7. International Trade Administration
8. United States Patent and Trademark Office

Department of Defense
9. Defense Counterintelligence and Security Agency

Department of Education
10. Federal Student Aid

General Services Administration
11. Public Experience Portfolio

Department of Health and Human Services
12. Centers for Medicare & Medicaid Services
13. Indian Health Service

Department of Homeland Security
14. Citizenship and Immigration Services
15. Customs and Border Protection
16. Federal Emergency Management Agency
17. Transportation Security Administration

Department of Housing & Urban Development
18. Housing and Urban Development

Department of the Interior
19. Bureau of Indian Affairs
20. Bureau of Trust Funds Administration
21. Fish and Wildlife Service
22. National Park Service

Agency for International Development
23. Agency for International Development

Department of Labor
24. Employee Benefits Security Administration
25. Employment and Training Administration
26. Occupational Safety and Health Administration
27. Office of Workers' Compensation Programs

Office of Personnel Management
28. Federal Employment Services
29. Retirement Services

Small Business Administration
30. Small Business Administration

Social Security Administration
31. Social Security Administration

Department of State
32. Consular Affairs

Department of the Treasury
33. Departmental Offices
34. Community Development Financial Institutions Fund
35. Internal Revenue Service

Department of Veterans Affairs
36. Veterans Benefits Administration
37. Veterans Health Administration

Cross-Agency Coordination
38. Recreation.gov

The included entities are identified as High Impact Service Providers (HISPs) and are subject to OMB Circular A-11 Section 280 activities including an annual enterprise-wide CX capacity assessment and action planning, designation of at least two high impact services, improved performance management for designated services, customer feedback collection and public reporting.

https://performance.gov/cx/

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Key Takeaways

A-11 280 outlines **best practices for using metrics** – customer experience and operational – to effectively manage service delivery, which include:

1. Making sure you can **use operational and administrative data** (either new, or what is already being collected) about services, across both analog and digital channels
2. Having a strategy for **asking customers for feedback about using your services** at moments throughout the service journey, especially post-transaction / at key service journey moments
3. Being able to **bring all of those data points together regularly** to inform service improvements and decision-making

From metrics to making improvements
A Case study - Unemployment Insurance

Office of Unemployment Insurance
Employment & Training Administration
U.S. Department of Labor

Research and recommendations for better claimant experiences

Customer experience, or CX, is about much more than having happier claimants:

It's about having:

- more well-informed claimants
- a higher number of complete and accurate filings
- increased claimant trust in UI programs
- reduced administrative burden for states

This project collected and shared recommendations for high-impact CX improvements to UI forms that could increase claimant self-service and quality of applications and reduce unnecessary intervention by state agency staff.

Resources are suggestions, not prescriptions, for state UI agencies

States are all at different points in their modernization journeys and have different requirements for claimants (e.g., in terms of rules to satisfy continuing eligibility), and our intention with these resources is **not to dictate changes to states**. For that reason, we chose not to include the following:

- A model application
- A comprehensive, end-to-end view of the entire claimant experience
- A fully fledged design that states must or could implement as-is
- Recommendations for specific policy or business process changes
- Specifics to any one state

Resources provide tangible examples and targeted recommendations

The resources developed include:

- **Research** focused on high-impact sections of the claimant experience
- **Recommendations** that help states make impactful improvements
- **Tangible examples** of what "good" looks for the UI claimant experience

Read more at [Improving online applications with CX principles | U.S. Department of Labor(dol.gov)]

- Improving mobile usability for claimants
- **Improving online applications with CX principles**
  - CX principles for online applications
  - Initial application instructions
  - Eligibility section
  - Personal details section
  - Employer and occupation sections
  - Review and confirmation sections
  - Weekly certification

Research questions guiding the initial application touch point

Initial Application – research questions

- What should claimants know before they begin an application?
- What common mistakes do claimants make when completing the application?
- Once they’ve submitted their application, what is most important for claimants to know?

Test prototypes for usability with real users

Usability testing

- Tested our prototypes with participants who had some experience applying for UI
- Asked participants to complete several tasks required for the UI application and weekly certification using our prototypes
- Asked participants how our prototype compares with their previous experience as well as their overall reactions to the content, questions, format, and interactions

Methodology and reference resources to conduct your own CX research

Process and artifacts that can be reused by other research projects:

- Outreach materials
- Screening
- Participant compensation
- Consent

Promote recruitment for research participants with outreach

Outreach

- Outreach starts once the team defines the research plan including research goals, research question and target participants
- Teams can promote the recruitment with printed posters in public places or online

Help make government unemployment insurance forms easier to use – and get a $50 Visa gift card for your feedback!

We are looking for individuals who are unemployed or who have recently experienced unemployment to better understand the issues people face when applying for unemployment benefits and completing weekly certifications.

- **If selected to participate, you will receive a $50 Visa gift card for completing a one-hour interview.** Sessions will be held between February and April 2024.
- Nava will present the participants with questions from mock unemployment applications and weekly certification forms.
- We'll meet either in-person (New York City or San Francisco Bay Area) or by video conference call.
  - We value your privacy so your responses will be kept confidential and anonymous.
  - In-person interviews will be scheduled in a private room at a public location, such as a public library near your home.
  - Virtual interviews will be scheduled as a video call in Zoom. If participating virtually, participants will need to find a quiet, private place to talk, have a good internet connection and use their own computer or smartphone.
- Interviews will be conducted in English.

How to Participate

Fill out this form using the QR code or this link:

http://bit.ly/government-forms-study

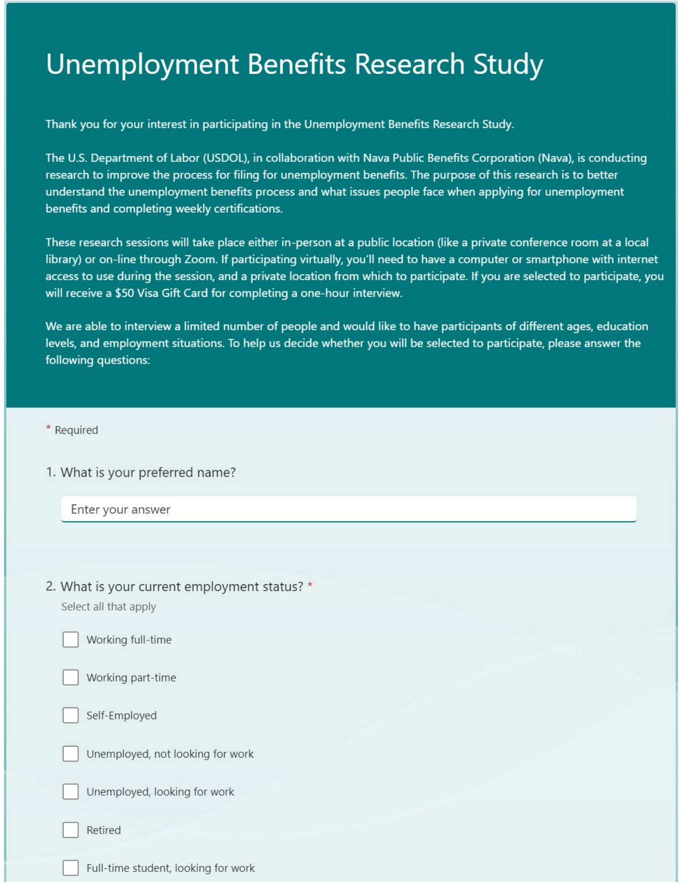
The study is being conducted by the U.S. Department of Labor (USDOL) in collaboration with Nava Public Benefit Corporation (Nava). Only those who complete an interview will receive compensation.

Questions? Email mayawagoner@navapbc.com

Screen out people who don't fit the target participant

Screening

- Outreach materials invited people interested in participating in the research to fill a form with screening questions
- A screener questionnaire helps us screen out people who are not our target participants, for example, those outside the United States or outside of working age, and to assemble a diverse and representative panel of participants



Compensate participants for their work

Compensation

- Incentives help ensure people take time out of their day to participate
- Without compensation, we are likely to only hear from people who can afford to volunteer their time for free
- Compensation helps recruit participants, especially from underserved communities
- Incentives make recruitment much faster, and reduce no-shows
- Our project used GSA guidance.
- For distributing gift card **incentives** to participants virtually, we used Tremendous

Ensure participants are fully consenting to the research process

Consent

Participants signed a document confirming their knowledge and understanding of how their data and the words they say would be collected, stored, and used.

Participant Agreement

* Required

We appreciate your time. In return for your participation and completing the interview, you will receive an honorarium of a $50 Visa gift card. Your time and input make it possible for us to improve the unemployment system.

We will be using information from the sessions to define and develop examples of how we can improve the Unemployment Insurance experience. By signing this form and participating in the session, you give us the right to use the information associated with your participation solely to improve the initial application and weekly certification experience. Your feedback will be kept confidential.

All interviews will be conducted by someone from the Nava Public Benefit Corporation (Nava) and include a notetaker who will be present in-person or online. In all cases we will take written notes during the session. We might share quotes from interviews with US Department of Labor (USDOL) staff members to help explain the participant experience when filing a claim.

We will protect your privacy. USDOL and Nava will seek to protect all personal identifying information to the full extent permitted under all applicable laws. We will not share your name or any other personally identifying information such as your address, email, phone number, birth date, or social security number with USDOL. Written notes will be maintained and disposed of by USDOL and Nava consistent with State and federal law whether or not you withdraw your consent or complete the project.

You can withdraw your consent or change your mind about what you have shared with us. You can do this during the session, at the end of the session, or after the session by contacting Maya Wagoner, mayawagoner@navapbc.com, 310-738-6857.

We appreciate you taking part in this session. Thank you very much for your time and feedback!

1. Consent

- [ ] I agree to participate in this research as described above
- [ ] I understand that my participation in this interview will not affect whether I receive unemployment insurance benefits or affect any open issues that I may have in the unemployment benefit system.

2. Please type your full name below to indicate that you have read your rights and consent to the above. *

Full name

Enter your answer

Developing resources to disseminate our CX recommendations

The analysis of our research findings resulted in a series of recommendations on what a good claimant experience looks like for UI claimants. From that, we developed:

- Six articles published on the Department of Labor website detailing our recommendations
- These include visual examples to illustrate our recommendations
- Also include links to additional resources that are publicly available

- Improving online applications with CX principles
- Initial application instructions
- Personal information section
- Employer and occupation sections
- Review and confirmation sections
- Weekly certification

References

Select secondary research

Initial application references

- Comparison of State Unemployment Laws 2022
- New Jersey's Worker-centered Approach to Improving the Administration of Unemployment Insurance
- Centering Workers—How to Modernize Unemployment Insurance Technology
- Promising Practices in State Unemployment Insurance Digital Service Delivery

Weekly certification references

- Chapter 6 of the New America report "A Playbook for Improving Unemployment Service Delivery"
- "Reforming Unemployment Insurance" from the Economic Policy Institute
- USDR Unemployment Insurance Modernization "Certify Weekly"
- California Employment Development Department Strike Team Detailed Assessment and Recommendations
- Benefit Accuracy Measurement Payment Integrity Information Act State Data Summary Performance Year 2021

Process artifacts

Discovery Research

- Employment history and occupation research synthesis
- State and advocate discovery interview guide
- Discovery research findings and recommendations
- Bibliography

Initial Application Discussion Guides

- State and advocate interview discussion guide
- Initial application research findings and recommendations

Weekly Certification Discussion Guides

- State and advocate interview discussion guide
- Weekly certification research findings and recommendations

Usability testing artifacts

Recruiting and screening materials

- Recruitment planning
- Recruitment flyer
- Screening questionnaire
- Participant agreement form

Overarching

- Usability testing process overview

Initial application research materials

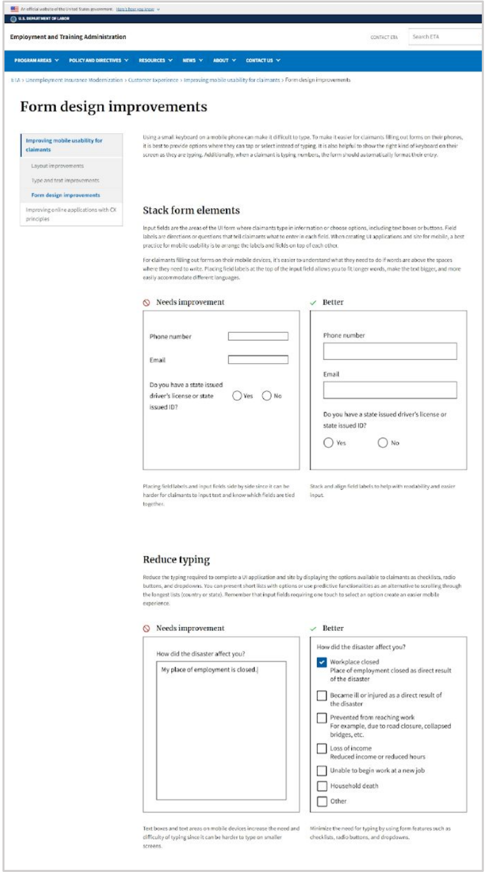
- Test plan
- Desktop prototype
- Mobile prototype
- Initial application findings and recommendations

Weekly certification research materials

- Test plan
- Able and available questionnaire
- Desktop prototype
- Mobile prototype
- Weekly certification findings and recommendations

Mobile usability articles

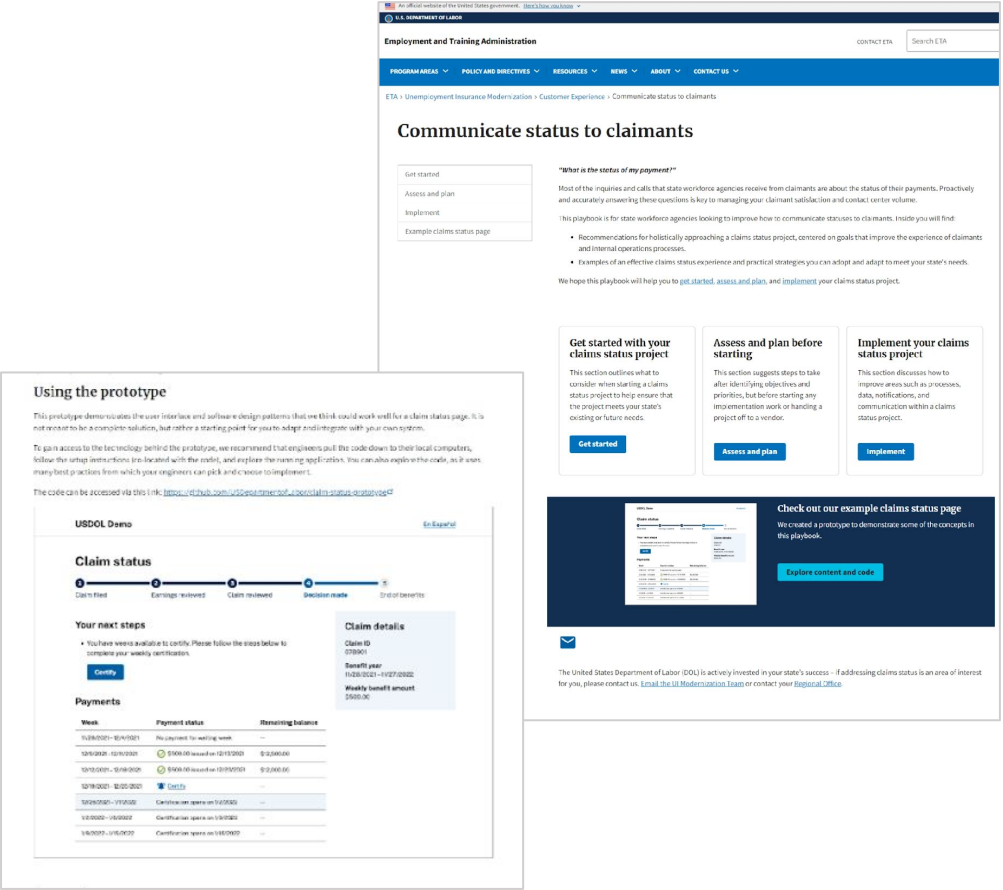
Specific examples of [layout](), [type and text](), and [form design]() improvements to optimize UI applications for mobile



Improving mobile usability for claimants | U.S. Department of Labor (dol.gov)

Claim status playbook and prototype

- [Playbook](#) with recommendations for states that want to build a claim status tool
  - [Get started (what to consider when starting a claim status project)](#)
  - [Assess and plan](#)
  - [Implementation recommendations](#)
- [Frontend, coded prototype](#) built using USWDS of a claim status tool

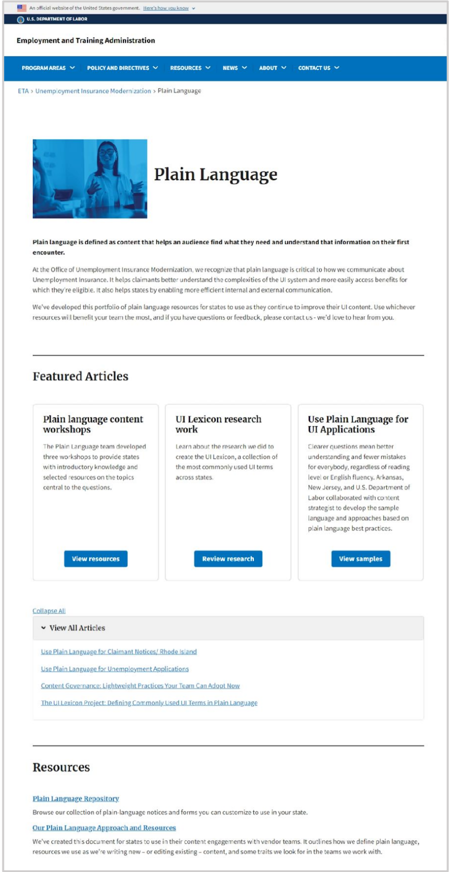


[Communicate status to claimants | U.S. Department of Labor (dol.gov)](#)

Plain language resources

Plain language resources:

- [Plain language content workshop recordings]
- [UI lexicon]
- [Plain language in UI applications – sample language]
- [Plain language repository]



[Use plain language | U.S. Department of Labor (dol.gov)]

How User-Centered Data Analysis Can Guide State UI Agency Decision-Making

Jennifer Phillips, Program Lead, Network Collaboration
Digital Benefits Network
formerly Assistant Deputy Director, Service Delivery, Illinois Dept. of Employment Security

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What was Illinois doing to understand customer experience?

Examples of CX Data Analysis

- **Survey analysis**: point in time survey at end of online claim application - over 330,000 responses since April 2020 ~ about 8% response rate weekly
- **Funnel analysis**: to find points of friction in the UI application and the certification online processes
- **Observational research**: live claim filing
- **Website analysis**: Using website and other analytics to drive content changes for better navigation, language access, accessibility, and plain language
- **Journey maps**: creating maps that identify pain points along the UI experience - start to finish

Evaluating customer experience with survey design

USDOL Blog Post

	Question	Answer type/scale	Rationale
Q1	How difficult was it to apply for unemployment insurance benefits online?	Very hard, hard, somewhat easy, easy, very easy	
Q2	Is this your first time filing for unemployment insurance benefits?	Yes/No	This question is intended to identify any specific issues for first-time UI claim filers. For future data analysis, IDES can, in theory ,identify claimant experience issues that might disproportionately impact new UI claimants.
Q3	Is this your first time filing online?	Yes/No	The rationale for this question is like Q2, but focused on identifying claimant experience issues that might disproportionately impact UI claimants who are filing online for the first time.
Q4	Where did you learn about how to apply for unemployment insurance benefits online?	Dropdown plus 'other' option Selection options: • Internet search • IDES website • IDES local office • Employer • Union • Illinois workNet website • Illinois workNet Center/American Job Center • Get Hired Illinois website • Through your state legislator • At your library • At a community college • Through another state agency • Word of mouth (friends, family) • Other: please specify	Rationale focuses on where and what sources claimants are using to learn about UI and how to apply. IL has a hunch it may not be the IDES website, and they want to learn more about the best ways to reach claimants.

What Extends Completion Time?

Application process experience for applicants

LENGTH	Number of questions can be overwhelming	• My profile questions are similar to ILogin account creation questions • Some question choices lengthen application even more
TOUGH QUESTIONS	Some questions are unclear, confusing, or hard to calculate	• Exact numbers and dates are hard to find • "In how many weeks during this employment period have you earned $578 or more?" • Definitions and pop-ups for some questions unclear

Friction Funnel Analysis: Understanding Where People Drop Off and Abandon the Application

Users

Active?	Users	%
Active	58,410	86.76%
Inactive	8,916	13.24%
Desktop/Mobile	**Users**	**%**
Desktop	43,581	64.73%
Mobile	27,551	40.92%
Claim Type	**Users**	**%**
No Claim	52,778	78.39%
New	7,263	10.79%
Additional	6,018	8.94%
Reopen	1,265	1.88%
Transitional	2	0.00%
Grand Total	**67,326**	**100.00%**

Claims

	Users				Sessions	
Active?	**# Users**	**# Req. Mult. Sessions**	**Avg. # of Sessions**	**Avg. Time from 1st Hit**	**# Sessions**	**Avg. Session Time**
Active	14,109	4,290	1.59	5:03:38	14,130	0:19:32
Inactive	439	212	1.94	11:02:54	439	0:23:41
Desktop/Mobile	**# Users**	**# Req. Mult. Sessions**	**Avg. # of Sessions**	**Avg. Time from 1st Hit**	**# Sessions**	**Avg. Session Time**
Desktop	11,193	3,193	1.54	4:51:36	11,206	0:19:01
Mobile	3,356	1,309	1.79	6:30:46	3,363	0:21:47
Claim Type	**# Users**	**# Req. Mult. Sessions**	**Avg. # of Sessions**	**Avg. Time from 1st Hit**	**# Sessions**	**Avg. Session Time**
New	7,263	2,371	1.67	5:28:01	7,263	0:23:54
Additional	6,018	1,786	1.53	4:32:22	6,038	0:16:39
Reopen	1,265	343	1.51	7:12:29	1,266	0:09:36
Transitional	2	2	4.00	6:08:24	2	0:16:39
Grand Total	**14,548**	**4,502**	**1.60**	**5:14:29**	**14,569**	**0:19:39**

Users

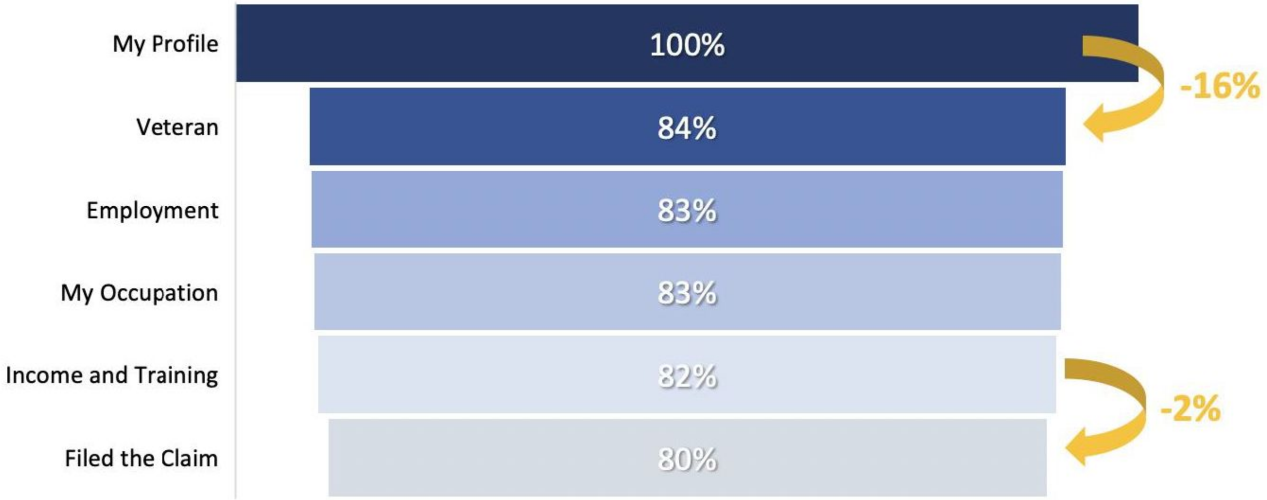
	# Users	% of All Users	% of My Profile Users	% Users Stopped Here	% of My Profile Users Stopped Here
Claimant Home - Successfully logged In	67,323	100.00%		61.40%	
Navigated to claim filing process	25,983	38.59%		12.95%	
claimURLTracking: My Profile completed	17,261	25.64%	100.00%	3.12%	12.18%
claimURLTracking: Veteran completed	630	0.94%	3.65%	0.10%	0.39%
claimURLTracking: Employment completed	14,990	22.26%	86.84%	0.10%	0.40%
claimURLTracking: My Occupation completed	14,910	22.15%	86.38%	0.18%	0.71%
claimURLTracking: Income and Training completed	14,791	21.97%	85.69%	0.53%	2.06%
Filed the claim - Landed on claim confirmation page	14,548	21.61%	84.28%	21.61%	84.28%
	67,326	**100.00%**	**100.00%**	**100.00%**	**100.00%**

Filed Claims

# Users	# Req. Mult. Sessions	% Req. Mult. Sessions	Avg. # of Sessions	Avg. Time from 1st Hit
14,548	4,502	30.95%	1.60	5:14:29

Funnel Data Analysis

Completion Rate per Section



Source: Funnel analytics data, IDES (8/6/2023- 10/1/2023); Number of claimants who completed "My Profile": 87,418

*Roughly **80% of** claimants who "started" the application finish. **20% attrition rate** = **7,900** unsuccessful claims each month.*

*Finding drop-off reasons/section specific issues was another **survey redesign target***

Improving UI benefits delivery through direct observation of UI claimants

USDOL Blog Post

Rockford
Juanita Molina, Juanita Ramos, Jeff Zeal

IDES
ILLINOIS DEPARTMENT OF EMPLOYMENT SECURITY

Pilsen
Ashley Dunbar, Walter Shepard, Nelida Smyser-DeLeon

Mt. Vernon
Sarah Corbett, Leigh Ann Ward, Debra Keelin, Ryan Lynch, Marilyn Shores
Stephanie McKinney, Keica Moore, Leonor Soto

Harvey
Gabriel Pauls, Jeanette Hernandez, Lisa Simpson, Vanessa Poe, Nikki Rogers

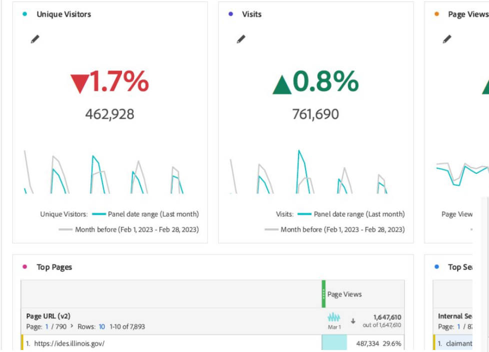
Peoria
Elizabeth Byrd, Terry Bitner, and Jill Warren

CX Friction points, by section

= required staff intervention to proceed

Website Analysis + Journey Mapping

Using Website Analytics to Prioritize Process Improvements



Summary of Recommendations

	Experience Theme	Strategy	Tactics	KPIs
Outside-in	Structure and Findability	• Enhance product discovery journeys to increase visitor engagement • Enhance navigation, pages to include common tasks and tools	• Use SEO best practices to make content findable • Build self-service modules	• Site traffic and engagement metrics • Call volume
	Internal Site Search Experience	• Improve relevance of internal search results • Enhance overall internal site search experience	• Use site search best practices to limit searches, make content more findable	• # of Queries • Time on site • Call volume
	Content Readability and Accessibility	• Optimize web templates with integrated accessibility • Enhance support journeys to increase visitor engagement • Standardize content deployment for consistency and optimal access	• Build accessibility standards into templates and components • Use PDF content as on-page content, as required	• # of Queries • Time on site • Accessibility scores
	Consistent Branding and Experiences	• Optimize templates, forms and downloadable assets for a consistent look and feel • Mitigate fraud risk to IDES	• Create "brand" guidelines and visual style guide	• Fraud claims • Risk
	User Experience	• Enhance on-site experience (templates, pages, components and content) by implementing UX best practices	• Create self-service, guided experiences to find information	• Engagement metrics • CWB Scores*
		mobile-first	• Implement responsive web design as part of AEM implementation	• Engagement metrics • CWB Scores*
		nagement processes	• Create workflows to automate where possible	• Engagement metrics • Time to market
		m experience decisions	• Define critical KPIs, a.k.a. "success metrics"	• Consistent reporting

Customer Journey: Claimants

Adobe

Persona

Charlotte

Needs: find a frictionless way to file an unemployment claim and to be able to get paid quickly

"I need to know how to file a claim properly."

"I want to know if I'm eligible for a claim and when the fund is available."

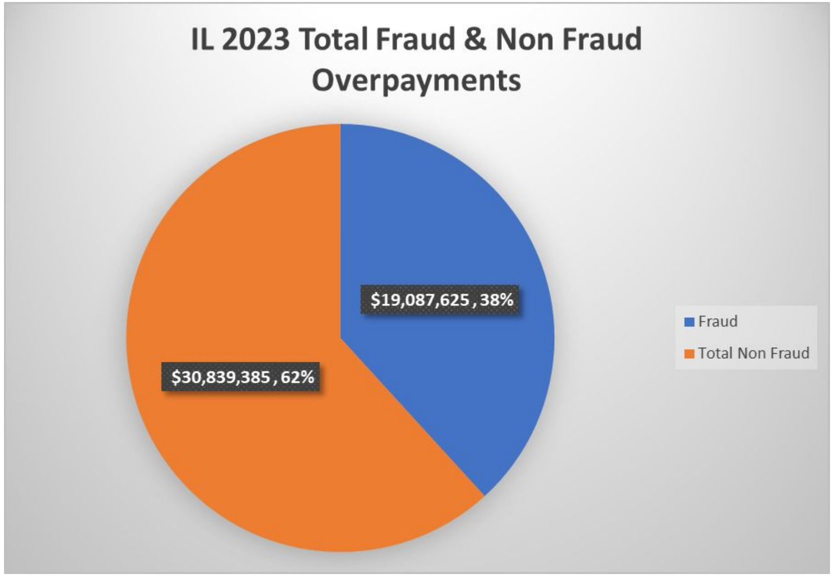
Plot

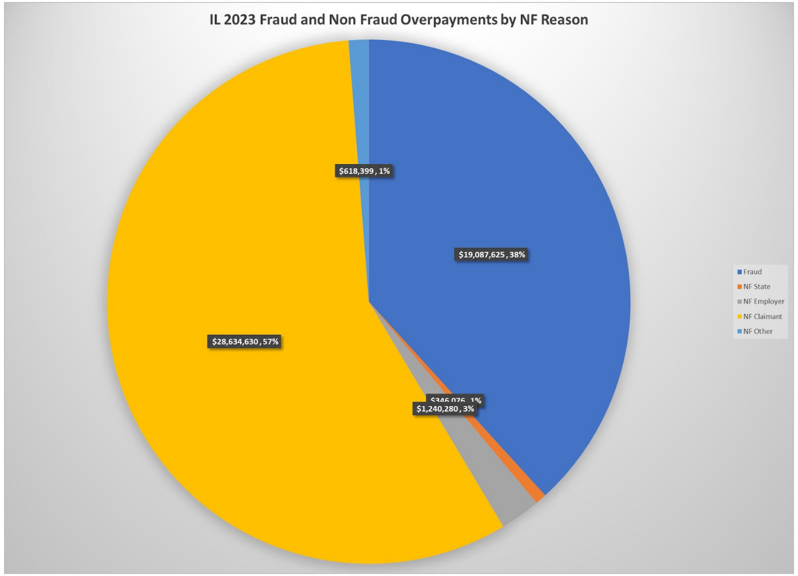
Charlotte recently lost her job at a local trucking company as a receptionist. She learns about unemployment benefits and comes to the IDES site to seek support. She files a claim and waits for the fund to be available to her. It's important to know how much and when the fund is available as it helps her manage her spending. While she is aided financially, she starts looking for a new job.

Customer Journey Stages & Definitions

	1. JOB LOSS	2. EXPLORATION	3. APPLICATION	4. CERTIFICATION	5. RE-EMPLOYMENT
CUSTOMER EXPERIENCE - PAIN POINTS	Charlotte lost her job. She hears about the unemployment benefit provided through IDES and comes to the website for the first time in her life. There is a lot of information on the main page as soon as she arrives at it. She tries to figure out where to even start.	Charlotte finds the first menu "File an Unemployment Claim" and clicks on it. She does not know what "regular" or "PUA" mean and which one she needs as the first-time claimer. There is a 9-minute video about the unemployment process but she's not feeling patient to watch the whole video. She goes ahead and proceeds with the next steps.	Charlotte creates an account and completes the submission of her claim. She gets the confirmation letter on the screen with the ID number. She's not sure if she gets a copy of the confirmation elsewhere, so she writes the information down on her notebook. She wonders what happens next and what to even expect.	Charlotte gets a letter and debit card in mail after a couple of weeks. She learns more about certification and recertification to be able to get paid with the debit card, but it's a lot to follow. She can't find how to log back into her account at the website. She also needs to upload documents but is not feeling completely safe to share her information.	Charlotte gets used to the cycle of certification. She now should start preparing for getting a new job. She wants to see what information is available for her to take advantage of without spending hours to go through the entire site. She finds JobLink.com. She comes back to the site everyday to check on recent postings.
QUESTIONS	Where in the website do I go to file an unemployment insurance? Do I have everything I need?	What is going to happen after I claim? Can I find key information about the process comprehensively in one place?	What happens after I submit my claim? When and how do I get the funding?	What should I do to get paid? Do I miss anything at all? When is my next certification date?	How can I be on top of recent postings on jobs or resources?
EMOTIONS	Charlotte is already frustrated about her job loss and looking at the website with massive information is overwhelming	Charlotte is constantly confused about what she has to do.	Charlotte is still confused with the whole process. She wishes someone could walk her through it quickly.	Charlotte is struggling to keep up with all the necessary action items to be able to get paid.	Charlotte still feels buried by so much information she needs to review.
OPTIMIZATION STRATGIES	• Navigation or on-site search • Chatbot • Search Engine Optimization	• Navigation or on-site search • Content with iconography and images • Chatbot • Search Engine Optimization	• Simpler login/registration flow • Email confirmation with claim and individual account information	• Simpler login/registration flow • Navigation or on-site search • Online forms • Email confirmation on the next steps and recertification deadline	• Email program • Social sharing • Personalization (e.g. Recently viewed pages, job postings)
METRICS	• On-Site Search: Number of Results • Traffic – Page Views • Bounce Rate	• On-Site Search: Number of Results • Traffic – Page Views • Bounce Rate	• # of calls • Exits • Completion rate (%)	• # of calls	• # of Email sign-up • Traffic – Page Views • Training/education resource utilization

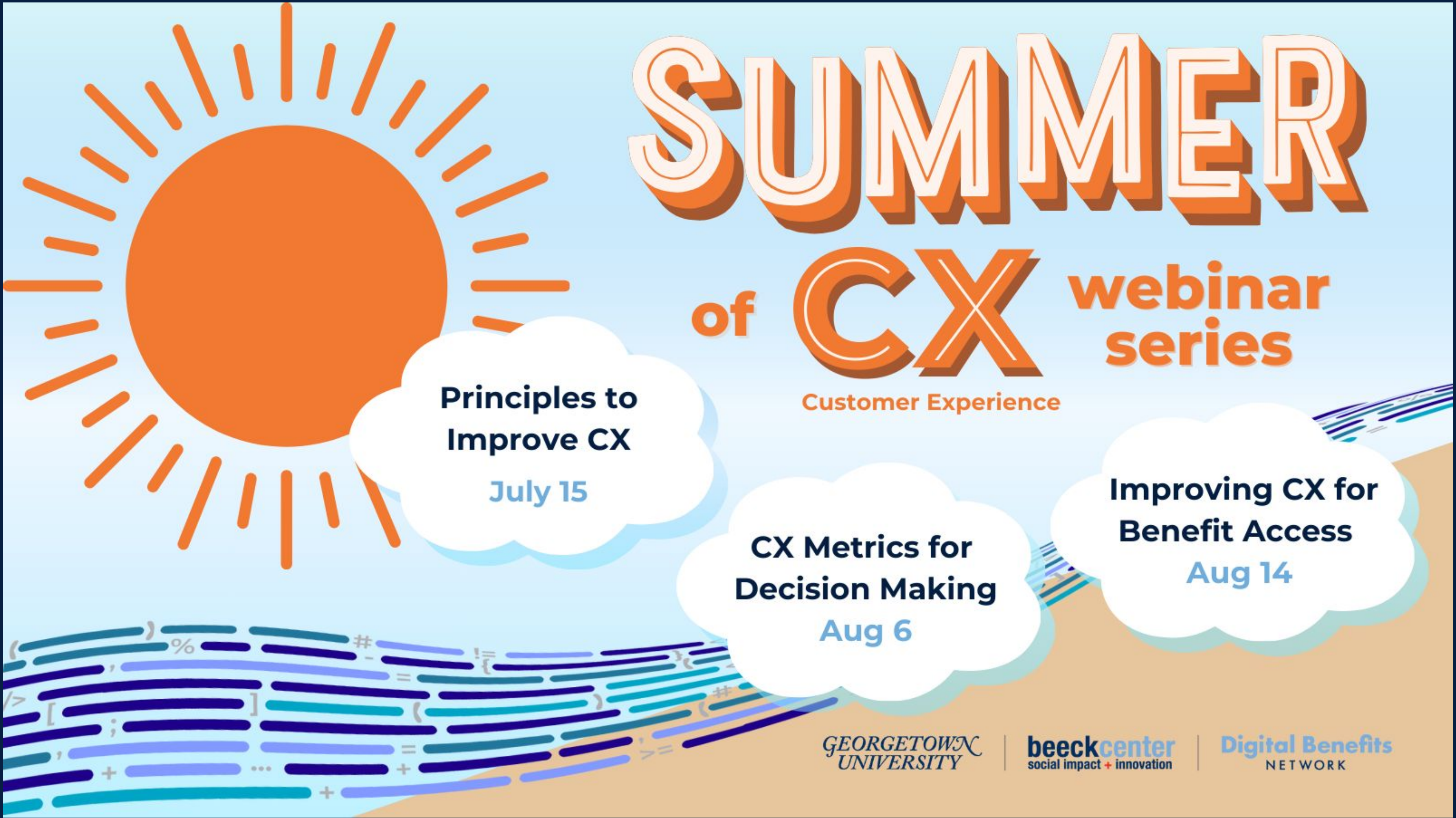
The Cost of Confusion and Mistakes





USDOL ETA 227: Overpayment Detection and Recovery Activities

Discussion & Questions


SUMMER
of CX webinar series
Customer Experience
Principles to Improve CX
July 15
CX Metrics for Decision Making
Aug 6
Improving CX for Benefit Access
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Thank you!

About the Beeck Center

The Beeck Center for Social Impact + Innovation at Georgetown University brings together students, expert practitioners, and extended networks to work on projects that solve societal challenges using data, design, technology, and policy. Our projects test new ways for public and private institutions to leverage data and analytics, digital technologies, and service design to help more people.

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