



# Transforming Customer Experience in Government

A Roadmap for Success



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# Introduction

It has been over a decade since Forrester researchers Harley Manning and Kerry Bodine published *Outside In: The Power of Putting Customers at the Center of Your Business*, a book widely considered essential customer experience (CX) reading. In the intervening years, the practice of CX has matured into a critical organizational function across private industry in sectors from banking and retail to manufacturing and tech. More recently, CX has earned a spotlight in the public sector, notably showing up in the President's Management Agenda (PMA) of the four most recent administrations as well as various executive orders and circulars and memorandums issued by the Office of Management and Budget (OMB).

The guidance and mandates have spurred many federal agencies to develop CX capabilities, but the *why* behind establishing good CX practices in government goes much deeper than “because we’ve been told we must.” Service is woven into the DNA of the public sector and many public servants in federal, state, and local government have enthusiastically taken up the mantle of CX, working within their organizations and across the government at large to drive customer-centricity.

We're at a critical juncture for investing in CX in government, with advances in digital channels and artificial intelligence (AI) providing both immense opportunities and complexities in the ways we deliver services. At the same time, customers are becoming increasingly frustrated with digital services that don't work well or that aren't designed with their best interests in mind,<sup>1</sup> and the public's trust in government, which has been found to be correlated with the effectiveness of government service delivery, is nearing historical lows.<sup>2,3</sup> Now is the time to double down on CX and take stock of what it will require of our organizations, and of what might be holding us back from our potential.

**To develop a strong CX practice, it is not only necessary to make shifts in our actions, but also to make substantial changes in how we plan, evaluate, and design solutions.**

Starting the CX journey can be challenging for organizations due to the entrenched patterns of business-centric thinking that are reinforced by organizational structures and norms. These structures often include traditional hierarchies, specialization into silos, and compartmentalized decision-making, all of which prioritize efficiency and compliance over service delivery.

However, it's important to recognize that customers and their journeys don't fit neatly into these existing structures that were created to simplify business operations and minimize risks. To serve customers well, organizations need to foster a new way of thinking across all levels and departments. Performance.gov has identified several barriers to CX, including the fact that "CX is too often not a priority for staff at all levels, requires cross-silo coordination, and program ownership."<sup>4</sup> Overcoming these barriers requires a shift in organizational culture which is both the most challenging and most crucial element of adopting CX.

Certainly, we can and should develop CX expertise, but simply adding a new competency and tracking a few new metrics won't lead to success. Lasting and meaningful change requires us to evolve how we work across our organizations. The responsibility of leveraging human-centered design should not fall solely on the CX team, nor should it be limited to just the "experts," especially as our organizations grow in CX maturity.

No single program or team can transform the experiences an organization creates for its customers; to do that, we must genuinely collaborate and cocreate new and improved approaches to service delivery, across our silos and up and down our hierarchies. The barriers these divisions represent won't begin to fall until we start thinking differently, not just about the problems we're trying to solve, but also about one another and the purpose that unites and propels us as public servants.

# CX Requires Genuine Collaboration

Our customers don't—and shouldn't have to—understand how our organizations are structured. From their perspective, the differences between business units, the diffuse ownership of our channels, and our siloed data are irrelevant.<sup>5</sup> Or, more simply stated, it's not *their* problem. Nonetheless, it's those divisions that are often the cause of the painful, disjointed, effortful interactions customers have with us.

Customers' relationships with our organizations often include the use of multiple products or services, which can span various channels: website, mobile app, phone, in-person, physical media, etc. Through these journeys, customers rightfully expect seamless, consistent, predictable experiences, regardless of whether those different services and channels are managed by one team or ten.

From an internal perspective, delivering on this expectation is far from simple. The scale and complexity of our organizational systems present two challenges in how we serve our customers: the practical challenge of coordination and the more nuanced challenge of design.

Coordination plays a crucial role in achieving successful CX, particularly as it pertains to the integration and sharing of systems and data, key components in the delivery of services. However, a deep dive into the technological and information management barriers to CX warrants a separate discussion. For our purposes here, let's focus on the process of design and, specifically, the ways our teams are—or are not—set up for success in identifying and addressing customer pain points.

Executive Order (EO) 14058 defines human-centered design (HCD) as “an interdisciplinary methodology of putting people, including those who will use or be impacted by what one creates, at the center of any process to solve challenging problems.”<sup>6</sup> Practicing HCD involves utilizing a shared language and toolbox to adequately comprehend and define problems that need solving. This methodology is intended to generate and refine solutions that effectively work for end users and service providers and consider organizational constraints. But perhaps most importantly, as the EO calls out, HCD is a methodology that prioritizes inclusion. It allows us to learn about our customers' needs and expectations, and their journeys with our organizations, while giving us insights into the complex ways they interact with our services—complexity that is best understood when we tap into diverse perspectives through both customer and stakeholder research and within our design teams.

## Addressing the Impact of Mental Models

As individuals, we tend to operate with a limited view that only allows us to see parts of the system. Our perspective is restricted by our position and by mental models, which are the always on, but never complete lenses through which we view the world.<sup>7</sup> Our mental models may not always be wrong or harmful, they are valuable in creating an efficient way for us to understand the world and make decisions. However, during the design process, mental models can lead to unintentional biases in the products or services we build.

**Our goal shouldn't be to rid ourselves of all our mental models, but rather to become aware of them, examine them, and determine whether they are useful or misleading.**



A simple way to become aware of our mental models is by engaging with people who do not share them. Inclusion in the design process is perhaps the most important tool we can use to root out biases. Furthermore, we should aim to include our customers themselves, because one of the strongest and most reinforced mental models most of us bring to design is the perspective we've developed as organizational insiders—people who often share knowledge, expertise, and history. Many of us presume that we understand and can adequately represent our customers well, but too often, we end up designing for ourselves.

Just as a front-line employee can't deliver great customer experiences if they lack the necessary information or tools, a design team can't *create* great customer experiences without diverse perspectives and direct input from (and, in the best of cases, interaction with) the people who use our products and services.

Further, given the complex organizational systems within which we are designing, we can't limit our focus to just the "front stage," the customer-facing portion of our services. We must equip our design teams to look beyond the surface and investigate the processes, people, and technologies those customer-facing interactions rely on. Moreover, we can't limit our focus to a single customer touchpoint or service delivery channel. We must broaden our scope, considering and improving the customer journey holistically, realizing how changes in any one touchpoint influence customers' experiences across all touchpoints.

# Why We (Usually) Don't Collaborate

None of us, regardless of our passion or expertise, can fully see the whole picture on our own. To overcome this particular challenge, we must embrace collaboration, but not the rote approach of gathering all the stakeholders in a room and following the same scripts we've used for decades. Instead, we need the type of collaboration where shared vision becomes the focal point, where egos are set aside, and where we trust one another (and ourselves) enough to step beyond our designated roles, comfort zones, and proverbial "pay grades."

To foster effective collaboration, we require an environment that encourages openness and the ability to provide critique. It should embrace collaborative dissent and provide the psychological safety to be vulnerable, to be wrong, and to point out shortcomings all without fear of negative repercussions.<sup>8</sup> We must leave behind the mindset of going along to get along, outwardly agreeing while secretly resisting. Politeness and reservation should be replaced with active involvement, welcoming others and their ideas into the actual work we do, rather than simply informing them from a distance.

When we recognize the fundamental role of collaboration in human-centered design, we must acknowledge and accept that our organizations are not structured to foster the kinds of relationships genuine collaboration requires. In fact, our hierarchies and silos, with their clearly defined boundaries, competing priorities, distinct cultural norms, and complicated politics, are the perfect environment to grow isolation and distrust between the parts of our organizations that need to come together to successfully deliver improved customer experiences.

## Examining the Impact of Hierarchies and Silos

**Hierarchies.** Historically, American business has strongly favored a formal and hierarchical structure, which remains the prevailing norm in the majority of government agencies. In fact, in her book, *Recoding America: Why Government is Failing in the Digital Age and How We Can Do Better*, Jennifer Pahlka specifically highlights hierarchy as a major impediment to achieving digital modernization that prioritizes customers and their interactions with government services. Despite numerous mandates and investments aimed at modernizing and improving how the government meets customer needs, many of these efforts fail to meet their



CX objectives. As Pahlka states, “We must recognize the limits of simply ordering change from the top rather than enabling change from all directions.”<sup>9</sup> Rigid hierarchies create a gap between decision-making and implementation, limiting the inclusion of diverse voices. What’s more, those decisions, which often result in laundry lists of requirements that aren’t informed by customer needs, are like a game of telephone, prone to distortion as they are passed down the hierarchy to those responsible for executing them.<sup>10</sup>

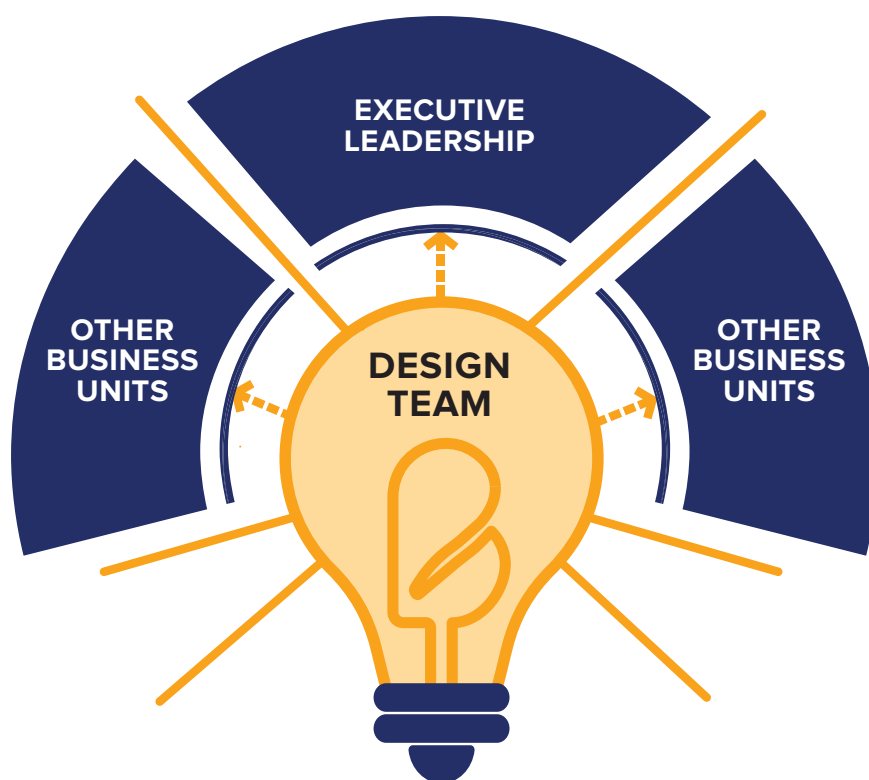
In addition, hierarchies have an insidious cultural impact on employee engagement in general. Command and control hierarchies are preoccupied with whether employees comply with what they’re asked to do, not with getting them to commit to a shared vision and engage meaningfully in the work of bringing that vision to life.<sup>11</sup>

When employees are not included or encouraged to contribute towards achieving the organizational vision, most of them will simply carry out their job responsibilities without going the extra mile. If employees feel their ideas are not valued—or worse, if employees perceive expressing opinions as risky<sup>12</sup>—they’ll refrain from sharing their insights not only with their leaders but also with one another. As a result, we miss out on a rich source of direct insights into our most challenging customer-impacting problems and innovative solutions to address them.

**Silos.** In his book *Silos, Politics and Turf Wars*, Patrick Lencioni argues that “There is perhaps no greater cause of professional anxiety and exasperation—not to mention turnover—than employees having to fight people in their own organizations.”<sup>13</sup> This statement can evoke feelings of exasperation or be interpreted through a lens of hope. On the one hand, it is frustrating that our most persistent problem, organizational silos, affects both the organization as a whole and the individuals within it. On the other hand, there is hope that not all the detrimental effects of specialization in our organizations are inevitable. If our employees share our desire to work across divisions toward a common goal, it presents a more optimistic picture.

That said, the way we've traditionally organized ourselves tends to create environments where our cross-functional design teams aren't given that option. Often, members of those teams are challenged by competing priorities, limited resources, different and often conflicting data sources, and direction to "work together" while being incentivized, both formally through performance plans and informally through team and organizational culture, to put their own business unit or function's immediate goals first, ahead of the shared vision, and often even before the needs of the customers.

In short, the rigidity of hierarchies and silos in our organizations hinders collaboration and fosters a culture of adherence to rules and risk aversion. But collaboration is an essential component of effective HCD, and HCD is the way we must design to reach our CX goals. With that in mind, let's turn our attention to understanding the characteristics of the collaborative teams we're trying to build and explore strategies for building them within our existing organizational environments.



**Divisions created by our silos and hierarchies often lead to isolated design teams and limit their potential impact.**

# The HCD Teaming Gold Standard

A high-performing cross-functional team operates through cooperative practices such as openness, constructive feedback, collaborative dissent, ownership, and accountability. A team like this requires leadership that fosters an environment of psychological safety, where team members feel comfortable being vulnerable, making or pointing out mistakes, and expressing disagreement. Further, the team should include a diverse array of voices and, when possible, both internal and external stakeholders (employees, customers, and partners). Diversity among the team protects the creative process from being solely influenced by any one person's assumptions, biases, and limited mental models. It allows the group to gain a comprehensive understanding of the challenges they're trying to address, to sidestep errors in thinking, and to imagine potential solutions that may never have been considered by an insulated team of homogenous "experts."



But teams like these don't just emerge, even if we get the right people together in the right room.<sup>14</sup> They need time and space, capacity and freedom, clarity and ground rules, and, above all, a purpose that every single team member believes in and protects. Breaking down each of these factors helps us fully appreciate the significant effort and leadership required to cultivate meaningful collaboration.

Allocating time and space for these teams may seem straightforward, but compressed timelines and infrequent working sessions often prevent design teams from spending adequate time on each part of the HCD process, let alone building the necessary trust and camaraderie required for HCD to yield effective results. Limited capacity exacerbates the timeline problem, making it difficult for team members to enter working sessions adequately prepared and to engage fully without distractions. Further, if the teams are not empowered with the autonomy to pivot and iterate based on their learnings, they'll find HCD impossible to perform as intended. Instead, it becomes a box-checking exercise meant to justify decisions that have already been made.

In conjunction with the need for sufficient autonomy, there is also a need for certainty—a shared understanding among team members. It's crucial to establish clear guidelines regarding how the team will collaborate and what they aim to accomplish. Working in this group will likely look and feel different from past team experiences, and it's important to set expectations and educate group members on how they're expected to contribute.

Detailing team norms can be especially helpful in normalizing new practices, including embracing diverse perspectives, sharing ideas that might not feel fully developed, and engaging in discussions about human emotions, behaviors, and motivations, which are difficult to quantify but are essential to the “human” part of human-centered design. Even explicitly stated, these teaming norms may need time to be fully adopted, with some bumps and discomfort along the way. However, when everyone involved understands and appreciates the value of the team's purpose and objectives, which should be grounded in a compelling vision that puts the customers' needs front and center, the journey becomes smoother.

To ensure these teams thrive, it's essential to have a leader who is not only willing but also capable of meeting their needs. This leader should be prepared to advocate for things like time, capacity, and autonomy, both with team members' supervisors and the organization's executives. Additionally, they need to be prepared to effectively articulate the team's objectives and connect those with the organizational vision and take into account the individual goals and values each team member brings to the table. Furthermore, the leader must prioritize psychological safety and intentionally build a healthy team culture, recognizing that the quality of the working relationships these team members form will directly impact the quality of the insights and solutions they produce.

## Typical Lifecycle of a Dysfunctional Cross-Functional CX Team

Imagine the following scenario: You find yourself in a situation where you are working with teammates who you barely know. The team has been tasked with fixing a known issue with the customer experience. However, due to the lack of clarity regarding the desired outcomes and the presence of individual, implicit goals, you end up developing a research plan that lacks focus. Time constraints prevent the team from conducting extensive stakeholder and customer research, and as a result, you hastily generate surface level findings, without questioning each other or the status quo, and never delving into the complexity required to uncover meaningful insights.

The findings you do produce call into question the project requirements, which have been handed down to you by your executive leadership. You soon discover, as suspected, that those requirements are inflexible, even when confronted with research. This realization intensifies your frustration as the team enters the ideation phase, with each member still feeling disconnected from the rest of the group and uncertain about the shared purpose. What each of you is keenly aware of is that various constraints, some unavoidable and some seemingly arbitrary, hold significant influence.

Given this starting point, it's highly unlikely that the team will be able to design a solution that effectively meets customer needs and expectations. However, there's no need to worry: Since nothing really got fixed, you know you'll likely get the opportunity for another attempt, and perhaps next time, circumstances will be more favorable. It's critical at this juncture to remember that this work — work done to establish and foster a high performing cross functional team — is an ongoing effort. These teams are not static or usually permanent. Teaming this way isn't necessarily a different approach to how our organizational charts look on paper; it's a framework for how we collaborate and assemble the right people in the same room and set them up for success. And we must prepare to repeat this process as needed, forming, disbanding, and reforming teams in multiple iterations for various purposes over time.

In truth, this approach requires a significant amount of effort, but the investment is necessary to realize the promise of human centered design. If we can achieve this level of engagement from individuals both within and outside our organizations, we become equipped to develop an evolving understanding of our customers, our own organizations, and the complex service ecosystem they collectively form. Equipped with that understanding, we can design solutions that are more sustainable and better aligned with the needs of customers and service providers alike.

# Your Role in Building a Collaborative, Customer-Centric Culture

The types of teams described above might seem idealistic, perhaps even unobtainable. But teams like these do exist and are currently operating in organizations across the United States and the world, setting the bar for CX and shaping customer expectations.

Building such teams takes grit and determination.<sup>15</sup> Regardless of your role, your position in the hierarchy, or your degree of organizational influence, there are several steps you can take to shape your organizational culture into this type of holistic, engaged collaboration. The following recommendations are divided into three sections: those for individuals, people leaders, and strategic leaders.

## Recommendations for Individuals

Regardless of where you sit in your organization, whether you're a front- or back-office employee, an individual contributor, or a strategic leader of a large and complex business unit, you can leverage your daily work interactions to foster the kind of relationships and work environment necessary for successful CX. Consider some of the following recommendations:

### Watch your language.

Be mindful of your words and their implications, particularly when it comes to oft-repeated phrases and jargon. Organizational cultures are shaped by our actions and language, even when unintended. Phrases like “that’s above my pay grade” or “I’m staying in my lane” symbolize division, and the more we say and hear them, the more likely we are to disengage from the very conversations that ought to include more voices and perspectives.

### Make space for feedback.

Look beyond formal processes to discover new opportunities to gather feedback from others. Consider who might have an interesting perspective you aren't used to hearing—someone who isn't your leader or a teammate you frequently interact with. Be sure to invite feedback before offering it. Create a safe space to share, and enter with an open mind, ready to learn and examine your mental models.

### Speak up.

Be willing to engage when you have ideas to share, or even questions to ask, regardless of whether you're an expert or whether it's “your job” to do so. Bring humility and a beginner's mindset to these conversations, and balance that with confidence in what you *do* know and the value your perspective brings to the conversation.

## Recommendations for People Leaders

If you supervise others, you are arguably in the most critical role when it comes to shifting the organizational culture, especially in terms of collaboration and teaming. Even if your team is not cross-functional, modeling, encouraging, and recognizing the kinds of engagement required for strong teams will have a positive impact as your team members work in various contexts both within and beyond your sphere of leadership.

### **Model and encourage critique and collaborative dissent.**

As your team's leader, you should be the first to invite feedback, and should model the ability to accept dissenting opinions and critique with an open mind. Establish consistent, predictable processes for giving and receiving feedback in both one-on-one and team environments, grounded in shared goals and an overt commitment to each other's (and the team's) best interests. By creating this space, sharing dissenting ideas and critique progressively becomes less uncomfortable and more exciting, fostering a culture of continuous learning and improvement.

### **Prioritize growth over performance.**

In the spirit of servant leadership, invest in your team members' growth, understanding that growth requires learning and stretching, and mistakes will be made along the way. Create a space where it is safe to be imperfect and learn from missteps. Provide clarity and support, enabling team members to feel confident taking risks. Gradually empower them to make decisions, to represent the team, and to take on increasingly complex work. It's important to note here that this is an essential component of making critique less daunting—if you're not expected to be perfect, feedback doesn't feel like a looming threat.

### **Value and learn from newness and inexperience.**

When someone joins your team, treat it as an opportunity to gain insights into your organization, your team, and your own leadership. New employees have a superpower: they do not see things as just background noise or "business as usual." Their fresh perspective can help you reflect on why certain practices exist and whether they still hold relevance. And, as a side benefit, welcoming and elevating the perspectives of new team members models for their peers that expertise and tenure are not the sole determinants of the value of one's opinion.

## Recommendations for Strategic Leaders

If your role allows you substantial influence over organizational levers such as structures, incentives, training programs, and tools, you have the power to establish an environment where collaboration thrives. In his book *Silos, Politics, and Turf Wars*, Patrick Lencioni says that silos are not the invention of executives, but rather a consequence of lacking a “compelling context for working together.”<sup>16</sup> Let’s provide that context:

### **Identify barriers to collaboration within your formal structures.**

Consider your organizational design and your approach to strategic, team, and individual goal setting, and to performance management and incentives. Do any of these hinder collaboration? Are individuals given adequate time and resources to engage in collaborative efforts with well-defined, shared goals, and a clear and compelling reason to care about those goals? Are they actively encouraged to prioritize the success of the collective “we” and the organization as a whole over individual or departmental success? When conflicts arise, priorities that are closer and more tangible tend to take center stage, so aim for alignment between personal, team, and strategic priorities to avoid inter-team conflicts.

### **Emphasize relationship building and teaming best-practices in communities of practice or interest.**

Communities that bring together people from across your organization around shared focuses are ideal for establishing collaborative teaming norms. If your organization doesn’t have these types of groups, start by creating them. Identify individuals who are passionate about a particular discipline or topic and empower them to take the lead on building a community dedicated to sharing and learning.

If your organization has established communities of practice that mainly provide show-and-tell sessions, with members bringing their finished work to share, encourage these groups to think of each other more as a team and less as an audience. These groups can benefit from dedicating time to working sessions, open discussions, and idea generation and feedback. Establishing ground rules can help large groups to clarify expectations, and foster trust and psychological safety.

### **Provide training and facilitation to guide the process.**

Building a healthy and collaborative teaming environment is challenging, and often having a neutral third party to provide both context and facilitation can be immensely helpful. As your organization works to accelerate its CX practice and build a strong, diverse network of CX advocates and champions, Bixal can help. In the coming months, we’ll be offering our “Foundations in Customer Centricity” training program which is designed to establish cross-functional teams and empower them to tackle CX initiatives. Through a combination of live, interactive trainings and facilitated working sessions, our experts will help your team apply their growing CX and HCD knowledge to solve complex problems together.



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## About Bixal

Based in Fairfax, Virginia, Bixal is a mission-driven consulting company working alongside governments and organizations to help them deliver better services and experiences to the communities they serve. Using evidence-based knowledge and technology, we empower clients to deliver on their missions more effectively by fostering a culture of learning and continuous improvement.