



EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF MANAGEMENT AND BUDGET
WASHINGTON, D. C. 20503

DEPUTY DIRECTOR
FOR MANAGEMENT

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MEMORANDUM FOR HEADS OF EXECUTIVE DEPARTMENTS AND AGENCIES

FROM: Jeffrey D. Zients
Federal Chief Performance Officer and
Deputy Director for Management

SUBJECT: Implementing Executive Order 13571 on Streamlining Service Delivery and
Improving Customer Service

In Executive Order (EO) 13571, issued on April 27, 2011, the President stated that, “with advances in technology and service delivery systems in other sectors, the public's expectations of the Government have continued to rise,” and that the Government “must keep pace with and even exceed those expectations.” In addition, the President made clear that the Government “must also address the need to improve its services, not only to individuals, but also to private and Governmental entities to which the agency directly provides significant services.”

The President instructed the Federal Chief Performance Officer, who also serves as Deputy Director for Management of the OMB, to issue any necessary guidance for implementing the activities outlined in the order. This memorandum provides guidance for implementing EO 13571.

1. Improve Customer Service Delivery

To keep pace with the public’s expectations and to respond to budget pressures that demand we do more with less, the Federal Government must deliver services better, faster, and at lower cost. Each Chief Financial Officers (CFO) Act agency (“agency” or “agencies”) that directly provides significant services to individuals or to private and governmental entities will improve customer service through the following activities:

- Publish Customer Service Plans – Within 180 days, each agency will post a customer service plan (“plan”) to its Open Government website. The plan will identify implementation steps for the customer service activities outlined in EO 13571, including a high-level discussion of the process by which a “signature initiative” to use technology to improve the customer experience will be designed and executed. The plan will prepare agencies to integrate specific customer service goals into annual agency performance plans and reports, as called for by the Government Performance and Results Modernization Act (GPRA) of 2010. Additional details about the nature and scope of the customer service plan are in the appendix.

- Establish a Customer Service Task Force – To facilitate the exchange of best practices and the development of agency customer service plans and signature initiatives, OMB will coordinate a Customer Service Task Force (“Task Force”), comprised of agencies that provide significant services, that will meet regularly until agencies publish their plans. By June 30, 2011, each agency should identify a senior official, who will be responsible for the customer service plan and related agency goals, to represent the agency on the Task Force and submit the appropriate contact information on the MAX customer service initiative site, <https://max.omb.gov/community/x/2o0Zlg>. Before final publication in October, participating agencies will conduct a peer review of their customer service plans.

2. Advance Customer Service through Innovative Technology

With advances in technology and improvements in service delivery systems, customers’ expectations continue to rise. To meet these expectations and increase efficiency, the Federal Government must incorporate increasingly common, lower cost self-service options that leverage technology, such as those accessed by the Internet or mobile phone. These efforts will help the Federal Government streamline and make more efficient its service delivery to better serve the public.

- Establish a Signature Initiative: EO 13571 calls for each agency to establish one major initiative (a “signature initiative”) that uses technology to improve the customer experience, address the gap between customer expectation and agency service delivery, and achieve efficiency gains. Initiatives will be outlined in the agency customer service plan (additional details on plan formulation are in the appendix). Signature initiatives will draw on best practice models that demonstrate the ability to use innovative technologies to increase customer self-service, reduce the need for phone or walk in inquiries, and continuously learn from customers. For example, various Government entities have developed systems that enable customers to: reserve an office appointment online, reducing time spent waiting in line; complete an entire transaction independently online, limiting the need for calls or office visits; track the status of a service online, allowing access to updates via a mobile device; and set up mobile text alerts for notifications on a range of topics, including emergency announcements, thereby engaging the agency directly with the customer.

3. Solicit Timely Customer Feedback

Pursuant to EO 12862, agencies that provide significant services to the public must survey customers to determine the kind and quality of services they want and their level of satisfaction with existing services. EO 13571 expands the definition of “customer” and encourages the use of a broader set of tools to solicit actionable, timely customer feedback to capture insights and identify early warning signals.

- Create a “Fast Track” Review Process – Concurrent with the release of this guidance, the Office of Information and Regulatory Affairs (OIRA) will provide guidance to agencies on the

Paperwork Reduction Act and a “Fast Track” review process for efforts to gather customer feedback to improve service delivery.

- Provide Guidance on Customer Feedback Options – Concurrent with the release of this guidance, OIRA will post online introductory documents for program managers on different options for collecting customer feedback.

4. Improve Online Services

More than half of all Americans accessed a Federal website in 2010 – evidence that many Government services are now delivered online. While many Federal websites provide timely and accurate information and services, many others have redundant, outdated, hard to use, or poorly maintained content. There are nearly 2,000 top-level Federal .gov domains; within these top-level domains, there are thousands of websites, sub-sites, and microsites, resulting in an estimated 24,000 websites of varying purpose, design, navigation, usability, and accessibility. This duplication not only can cause confusion, but also wastes taxpayer dollars. To simplify access to Federal services, the Government needs a comprehensive and consistent strategy for managing its web resources efficiently and assuring that valuable content is available online and is readily accessible.

The Office of Management and Budget (OMB), the General Services Administration (GSA), the Office of Science and Technology Policy (OSTP), the Chief Information Officers Council, and the Federal Web Managers Council will work with agencies to accomplish the following:

- Freeze Establishment of New Federal Executive Branch Domains – Effective immediately, all agencies will cease creation of new .gov domains for 90 days. GSA’s Office of Governmentwide Policy (OGP) will approve new domains only for those requests that have received a written waiver from the Federal Chief Information Officer (CIO). Should agencies need to establish new web content within this timeframe, they should leverage existing .gov sites and infrastructure.
- Update .Gov Domain Policy and Guidelines – Within 30 days, the Federal CIO, in collaboration with GSA, will establish a task force to solicit and develop recommendations to update Federal executive branch .gov policy and guidelines and best practices for managing Federal websites.
- Eliminate Duplicative and Outdated Websites – Within 30 days, GSA will make publicly available on Data.gov a list of all registered top-level .gov domain names. This list will be updated regularly. Within 60 days, GSA will provide agency-specific lists on MAX and the Federal CIO will issue instructions for how agencies should identify opportunities to improve content as well as eliminate duplicative and outdated websites. Within 120 days, each agency will use the agency-specific domain name list and related instructions to identify domain names that are no longer needed, websites that should be consolidated or eliminated, and website content that needs to be improved. Agencies will post on their Open Government page the actions they will take as a result of their review.

We look forward to working with each of you on this important effort. If you have any questions regarding the first two sections of this Memorandum, Improving Customer Service Delivery or Advancing Customer Service through Innovative Technology, please direct them to Katie Malague at kmalague@omb.eop.gov or 202-395-4633. Questions about the sections related to Soliciting Timely Customer Feedback or Improving Online Services should be directed to Adam Neufeld at aneufeld@omb.eop.gov or 202-395-5020.

Appendix: Customer Service Plans

Nature and Scope of Services – Plans should address approximately three to five of the agency’s highest volume services, including the most critical and significant transactions with customers. Agencies will determine appropriate services to address in the customer service plan. Illustrative examples include:

- Providing access to forms, applications, program information, and data;
- Processing of benefits, loans, grants, taxes, permits, and licenses; and
- Enabling self-service options such as online transactions and mobile applications.

Components of the Plan – The plan will identify key customer groups for the selected three to five highest volume agency services and summarize implementation steps for the customer service activities outlined in EO 13571, including a high-level discussion of the process by which a signature initiative will be designed and executed. To focus efforts on the initiatives themselves, plans should be no longer than 10 pages. The plan will outline the agency’s approach, intended benefits, and implementation timeline for the following:

1. Connecting with Customers

- Establish mechanisms to solicit customer feedback on government services and use such feedback regularly to make service improvements, such as:
 - Collect ongoing, timely, actionable customer feedback to identify early warning signals of customer service issues; and
 - Conduct customer satisfaction surveys and report the results publicly to provide transparency and accountability.
- Improve the customer experience by adopting proven customer service best practices and coordinating across service channels (including on-line, phone, in person, and mail services), such as:
 - Develop a process for evaluating the entire customer experience, ensuring consistency across service channels;
 - Coordinate with other agencies serving the same customers, identifying opportunities for using common forms and application materials and processes;
 - Analyze customer preferences for interactions and redirect resources from less preferred and more costly channels (such as printed materials) to preferred, less costly, and more widely accessible channels (such as Internet and mobile services), where appropriate and applicable; and
 - Ensure access and usability for people with disabilities and hard-to-reach and disadvantaged customer populations.

2. Setting, Communicating, and Using Customer Service Standards

- Set clear customer service standards and expectations, including, where appropriate, performance goals for customer service required by the Government Performance and Results (GPRA) Modernization Act of 2010 (Public Law 111-352), such as:
 - Develop customer service standards that are understandable to the public, easily accessible at the point of service and on the Internet, and measurable (where appropriate); where possible, standards should include targets for speed, quality/accuracy, and satisfaction;
 - Report progress in meeting customer service standards;
 - Provide an easy and accessible mechanism for customers to find out where they are in a given process and how long it will likely take to obtain service;
 - Make agency service contact information readily available to the public; and
 - Ensure appropriate mechanisms for handling complaints and resolving issues in a timely and satisfactory manner.

- Streamline agency processes to reduce costs and accelerate delivery, while reducing the need for customer calls and inquiries, such as:
 - Continually identify and implement ways to eliminate unnecessary steps;
 - Analyze the most common customer inquiries and evaluate potential process and communications changes to reduce the need for them; and
 - Assess process and technology changes for their impact on the customer's experience.

3. Leveraging Technology and Innovation

- Establish one major initiative (a “signature initiative”) that will use technology to improve the customer experience, aiming to:
 - Increase the efficiency of agency operations;
 - Identify ways to increase self-service, reduce the need for phone or walk-in inquiries, and continuously learn from customers; and
 - Build solutions that can be leveraged for other government services, or by third-party application developers, where possible.

- Identify ways to use innovative technologies to accomplish customer service activities, thereby lowering costs, decreasing service delivery times, and improving the customer experience, through activities such as:
 - Assess customer needs and expectations for services provided by the agency;
 - Analyze the gap between customer expectations and current agency service delivery;
 - Create and test a solution that meets the level of service needed to address the gap between the customer expectation and the agency's service delivery;
 - Gather customer feedback on the solution to determine whether it better meets customer needs; and
 - Use customer feedback to improve the solution, repeating the process to rapidly create an effective solution that meets the customer service need.