

SECTION 280 – MANAGING CUSTOMER EXPERIENCE AND IMPROVING SERVICE DELIVERY

Table of Contents

280.1	Who is responsible for customer experience and service delivery?
280.2	What is Federal government customer experience and service delivery?
280.3	How should agencies identify services?
280.4	What are agency responsibilities to deliver services and make them available through multiple channels?
280.5	How should agencies collect metrics to analyze digital services?
280.6	What is the purpose of implementing this guidance?
280.7	How should agencies manage customer experience?
280.8	How do these efforts relate to the Paperwork Reduction Act (PRA), reducing burden, improving access, and engaging customers?
280.9	How can agencies know their services are working and delivering value for the public?
280.10	How should customer experience be reflected in an agency's Annual Performance Plan?
280.11	What programs have been identified as High Impact Service Providers (HISPs)?
280.12	What steps should HISPs take to manage customer experience?
280.13	How should HISPs designate priority services?
280.14	How should HISPs collect and submit "post-transaction" feedback data?
280.15	What shall HISP CX Capacity Assessments and Action Plans include?
280.16	How should agencies participate in designated Life Experiences?

Summary of Changes

Updates submission dates for required deliverables, provides simplified structures for transaction surveys and data collection, and outlines leading practices for effective management of customer experience. This update also provides additional connection between customer research efforts and the Paperwork Reduction Act, and provides additional detail on the collection of digital analytics data to augment transactional surveys.

280.1 Who is responsible for customer experience and service delivery?

All Executive agencies (5 U.S.C. 105) have a responsibility to manage customer experience and improve service delivery using leading practices and a human-centered approach, pursuant to [Executive Order 14058](#) ("E.O. 14058") on *Transforming Federal Customer Experience and Service Delivery To Rebuild Trust in Government* of December 13, 2021, and the 21st Century Integrated Digital Experience Act (P.L. 115-336) ("21st Century IDEA"). All agencies should apply the guidance provided in this section for annual customer experience management and planning, as well as the design of feedback surveys and measurement strategies for the performance of Federal services. This guidance provides detail on activities to be conducted by designated High Impact Service Providers (HISPs, as defined in section [280.11](#)), which are required to implement the guidance in sections [280.12](#) through [280.15](#).

280.2 What is Federal government customer experience and service delivery?

It is the Federal government's responsibility to ensure that every interaction a member of the public has with their government demonstrates competence and transparency and builds trust. As defined by E.O.

14058, the term "customer experience" ("CX") means the public's perceptions of and overall satisfaction with interactions with an agency, product, or service.¹ Building on this definition and applied in the broader context of this Section and the Federal Performance Framework, the term refers to a combination of factors that result from touchpoints between an individual, business, or organization and the Federal government over the duration of an interaction, service journey, and relationship. These factors of experience can include: ease/simplicity/effort (burden/friction), efficiency/speed, transparency, equity (e.g., participation, access), humanity (e.g., respect, dignity, empathy), effectiveness/perceived value of the service itself, and interactions with any employees. Perceived responsiveness to individual needs and ability to provide feedback is also important.² Similar to their application in the private sector, these factors can drive the overall satisfaction with and trust in the program, agency, and the government at large. A customer's experience interacting with the Federal government directly contributes to their trust in government itself.³ To that end, measures of experience are of co-equal importance as traditional measures of financial and operational performance, and which this document begins to outline an accountability framework to deliver.

Services are the unit of observation for this performance accountability irrespective of perceived current ownership or budgetary/organizational lines. "Service delivery" means the actions taken by an organization, such as the Federal government, related to providing a benefit or service to a customer of a Federal government entity; the term refers to the multitude of diverse interactions between a customer and Federal agency. The Federal customer experience framework is centered on services. Services are a more well-defined unit of observation for customer experience management than a [Federal program](#). In many sectors, the service, even more so than the offering or end product, determines the customer's satisfaction and the reputation of the organization or brand. Other factors affect customers' total experience – the environment, prior interactions, etc. – but the service is the most critical part controlled by the entity.

Today, citizens are dissatisfied with government services when compared against the private sector, which has leveraged technology, process re-design, self-service, empowered front lines, and other tactics to raise expectations. All Federal agencies should have knowledge, and in some instances documentation, of the services they provide (e.g., SNAP recertification, land border checkpoints, business tax filing) and should be able to articulate how the components of the services, such as the occasion, offering, channels, roles, and tools, come together to make up the agencies' approach to service design and delivery.

The Federal customer experience framework is intended to provide agencies with a clear approach and roadmap for aligning service design with customer needs. For definitions of terms (such as "services" and service types) used in the previous paragraphs as well as others relating to CX and service delivery, please see <https://performance.gov/cx/terms>.

280.3 How should agencies identify services?

The 21st Century IDEA requires all Executive agencies (5 U.S.C. 105) to identify public non-digital, paper-based, or in-person government services for purposes of digitization. To fulfill this requirement, OMB requires agencies to develop an inventory of all services – digital, non-digital, paper-based, and in-person – offered to their primary customers, tasks to get or manage each service, and channels available to complete each task (e.g., online, in person, phone, mail, paper, etc.) and submit this information to OMB.

¹ E.O. 14058 defined critical terms like "Customer Experience." A list of related terms and their definitions can be found here: <https://performance.gov/cx/terms>

² The OECD has done work to demonstrate that "government's competence - its responsiveness and reliability in delivering public services and anticipating new needs - are crucial for boosting trust in institutions." See <https://www.oecd.org/gov/trust-in-government.htm>.

³ A recent analysis reveals that 67 percent of the public's trust in government comes from their experience with government programs. See <https://www.mckinsey.com/industries/public-and-social-sector/our-insights/Customer-Experience-in-the-Public-Sector>.

280.4 What are agency responsibilities to deliver services and make them available through multiple channels?

Service delivery through multiple channels increases access and participation, ensuring that government services are available to all – including those who need them the most, such as underserved communities. Agencies are encouraged to leverage a multi-channel approach – as is appropriate, feasible, and supported by customer research – including both traditional (e.g., in-person, postal mail, or phone) and digital channels, to ensure the equitable and effective delivery of services. Agencies should maintain accessible methods for completing services to enable individuals without sufficient access to information technology and/or digital literacy to successfully utilize those services.

280.5 How should agencies collect metrics to analyze digital services?

Agencies should ensure, to the greatest extent practicable, that all services and tasks are made available through digital channels using industry leading practices and human-centered design. Examples of digital service channels include websites, mobile apps, email, text messaging, and social media.

In general, and consistent with the requirements in OMB Memoranda [M-10-22 of June 25, 2010, Guidance for Online Use of Web Measurement and Customization Technologies](#) agencies should use the following leading practices for gathering and analyzing metrics for digital services:

- In designing metrics for a website or web application, agencies should work backward from customer insights and strategic questions. Agencies should define specific actions they plan to take to improve digital experience with the service or product based on insights derived from digital analytics.
- An agency's digital analytics program (e.g., the [General Services Administration's Digital Analytics Program](#)) should capture data from key customer actions, such as button clicks, page views, and transactions.
- Attach timestamps to data points to trace a user's journey through time as well as analyze macro-level shifts in user behavior over longer time periods.
- Collect website and web application metrics on a continuous basis to observe longitudinal trends.
- Website and web application data should be collected in a structured and machine-readable format to facilitate quantitative aggregation (e.g., sum, median, mean, minimum, maximum) of customer behavior data for analytics and monitoring.
- Agencies are encouraged to implement continuous monitoring and dashboards to proactively visualize when there has been a significant change or regression in the customer's digital experience (e.g., if page views or volume of key transactions has suddenly dropped). Implementing alarms to send alerts when critical metrics have regressed allows for immediate corrective action.
- As new user flows are added, digital analytics should be implemented at the launch of the new feature to ensure comprehensive monitoring of customer digital experience. Changes to continuous monitoring and dashboards should reflect any user flows that are optimized, deprecated, or replaced.

Customer experience transactional data generates perceptions of trust, confidence, and satisfaction with government services (see section [280.14](#)). The collection and use of website and web application data may be used to augment point-in-time data and may also be instrumental for evaluating an agency's changes to digital services that enhance customer interactions and experiences.

280.6 What is the purpose of implementing this guidance?

Implementing the guidance specified in this section will establish a more consistent, comprehensive, robust, and deliberate approach to CX across government. The purpose of this guidance is to:

- Increase agencies' understanding of customers' needs and measure continuous improvement of Federal government services to better meet customers' priorities;
- Establish a CX-mindful culture across Federal government services;
- Improve customer trust in Federal government;
- Provide structure and consistency around how agencies/programs approach CX;
- Promote accountability and governance mechanisms to improve service design, quality and service;
- Ensure Federal service providers are making progress in growing CX program maturity, service definition, and applying leading practices⁴;
- Ensure Federal service providers are receiving and acting upon customer feedback to drive performance improvement and service recovery;
- Allow for government-wide comparative assessment of trust in government following interactions;
- Ensure transparency through informed consent and public reporting; and,
- Encourage the application of human-centered design as foundational to achieving customer experience outcomes.

280.7 How should agencies manage customer experience?

At multiple levels of government organizations (departmental enterprise, bureau, program office, service center), elements of core CX functions should be present.⁵ These include:

- *Measurement*: Defining and instituting CX outcome measures, as well as service operational measures, to ensure accountability for improving service delivery and communicating performance across the organization and to the public, routinely analyzing and making use of this data;
- *Governance and Strategy*: Institutionalizing CX by identifying executives and leaders responsible, organizing supporting resources, defining the processes by which strategic decisions incorporate

⁴ For examples of leading practices and industry frameworks for managing customer experience, please review the annual CX Capacity Assessment template provided on [performance.gov/cx](https://www.performance.gov/cx).

⁵ For a practitioner's guide on implementing CX core functions and capabilities, see the CX Cookbook, <https://www.performance.gov/cx/assets/files/va-customer-experience-cookbook.pdf>.

customer perspective, and aligning CX strategy and activities with business decisions, initiatives and investments within the agency's broader mission and strategic priorities;

- *Culture and Organization:* Acquiring and developing the talent required to incorporate and improve CX within agency activities, and empowering all employees to adopt a CX mindset through training, performance measurement, and rewards;
- *Customer Understanding:* Identifying the main occasions that result in the public making use of or interacting with Federal services and conducting qualitative and quantitative research across organizational silos to map intra-agency customer journeys, as well as cross-agency journeys where applicable, to build and continually refine a knowledge base of the agency's customer segments and needs, integrating disparate customer interaction and administrative data; and,
- *Service Design and Improvement:* Adopting a customer-focused approach to the implementation of services, involving and engaging internal and external customers in feedback gathering and iterative development, designing and building digital products and services, adopting leading practices to deliver more efficient and effective interactions, and sharing lessons learned across government.

Each fiscal year, Executive agencies should reflect on their maturity and capacity to perform these functions, such as during strategic review, annual planning, and in executing requirements outlined in this section. Further, agencies and programs should develop an understanding of the types of and explicit definition of the services they offer (as defined in sections [280.2](#) and [280.3](#)); this should include an assessment of the talent they have to perform and oversee these functions, and specifically identify needs for hiring individuals with the expertise and experience into their agency.

280.8 How do these efforts relate to the Paperwork Reduction Act (PRA), reducing burden, improving access, and engaging customers?

Engaging customers and speaking directly with the public is a central component of human-centered design and leads to a better understanding of the problems faced by the public, including underserved communities, which helps agencies design solutions that are more responsive to the needs of the American people. The surveys described in section [280.14](#) are not the only methods through which agencies can engage with customers. When developing approaches to customer engagement, research, and feedback gathering, agencies should also consider burdens placed on individuals and groups most affected by information collection related to accessing and maintaining eligibility for public benefits programs.⁶

Agencies are to submit the feedback surveys described in section [280.14](#) for approval under the PRA using the *OMB Circular A-11 Section 280 Umbrella Clearance* that can be established at the department level using the templates provided on the [Customer Experience Collections MAX Page](#). Individual collection requests under this clearance will be reviewed by OMB's CX Desk Officer in collaboration with the relevant policy analyst in OMB's Office of Information and Regulatory Affairs (OIRA) in an effort to further harmonize the review of these types of collections. These umbrella clearances provide a framework for conducting qualitative customer research and user testing, both of which seek to involve the individuals and organizations that agencies serve in the actual design and improvement of those services.

⁶ Considering burden is in alignment with E.O. 14058, E.O. [13985](#) of January 25, 2021, on *Advancing Racial Equity and Support for Underserved Communities Through the Federal Government*, E.O. [14091](#) of February 16, 2023, on *Further Advancing Racial Equity and Support for Underserved Communities Through The Federal Government* and [OMB Memorandum M-22-10](#) of April 13, 2022, *Improving Access to Public Benefits Programs Through the Paperwork Reduction Act*.

Outside of the *OMB Circular A-11 Section 280 Clearance*, agencies are able to explore other opportunities for customer engagement. Agencies should note that approval under the Paperwork Reduction Act is not always required when speaking with members of the public, and OIRA has published [extensive guidelines](#) that can help guide agencies to appropriate flexibilities. Below are a few highlights that may be useful when an agency is looking to learn about the public's experience with their services:

- *Nine or Fewer Members of the Public*: PRA approval is not needed when an agency is speaking with nine or fewer members of the public. Often discovery and design work can be accomplished effectively with nine or fewer people, such as through interviews, focus groups, or product testing. However, using multiple groups of nine for the same purpose or with the same set of questions would require PRA approval.
- *Recruiting 10 or More Members of the Public*: The applicability of the PRA for recruiting members of the public depends on the intention and specifics of the request. For example, asking if people are interested in participating and, if so, to send contact information for attendance does not require a PRA approval; asking one or more screening questions (orally or in writing), such as "what zip code do you live in?" and "to what degree do you use this service?" will require a PRA approval.
- *Open-Ended Questions During the Design/Discovery Phase*: Conducting unscripted conversations in the design or discovery phase will not generally require PRA approval (e.g., displaying a prototype or service and asking for general thoughts and reactions, asking participants to narrate their experience of using a product or service, and asking questions during a public listening session to promote discussion).
- *Post-Transaction Data Collection of 10 or More Individuals*: PRA approval is needed for post-transaction surveys (assuming an agency is surveying 10 or more individuals). When data is being collected to understand and continuously improve an existing product or service (not during the design and discovery phases), the PRA will apply.

Increasingly, agencies are recognizing the importance of including hard-to-reach populations, particularly those from underserved communities, in their samples in order to improve the quality and representation of customer research. If your agency wishes to provide compensation or incentives to participants in focus groups or other similarly time and effort-intensive feedback surveys, the first step is to have a conversation with your agency's legal counsel to determine whether your agency may offer incentives, and if so, what kind and in what amount. If your agency's legal counsel approves providing incentives to participants, you will need to justify these incentives in the Information Collection Review package you submit to OMB. Contact the OMB CX Desk Officer for an example of what a justification for incentives should look like for purposes of the PRA submission to OMB.

280.9 How can agencies know their services are working and delivering value for the public?

Traditionally, agencies have solely used output and program integrity measures to assess performance. Under E.O. 14058, experience measures are considered equally as important as operational measures. There are various ways agencies should be collecting and using customer experience measures to monitor, improve, and report on the customer experience of their designated services. The following activities are core components of effective service delivery at an agency:

- *Customer Research Activities*: Customer research is one of the first steps agencies can take to better understand their customers and is generally associated with the discovery phase of the CX journey. Customer research enables agencies to learn who their customers are, their specific needs, and what

pain points exist, among other insights. Research can be conducted in both structured (e.g., a customer survey, a focus group) and unstructured (e.g., in-person customer observation, reviewing social media messages). Common products resulting from customer research include user personas, customer segments, and journey maps.

- *User Feedback Activities:* User feedback typically involves using tangible artifacts to help better understand how users will react or interact with a new or improved product or service (e.g., assessing customer reactions to a plain language rewrite of a website, launching a prototype of a new digital form). User feedback activities can be conducted in many formats including user observations, focus groups, card sorting, usability studies, A/B testing, and other methods.
- *Post-Transaction Feedback Data Collection:* Post-transaction feedback is any feedback that is collected from customers after they have engaged with a provider at a moment in their service journey. Typically, a post-transaction survey collects data on measures such as trust and other drivers of experience. With some exceptions, OMB defines post-transaction feedback as the 48-hour period following the end of a customer interaction with a service, acknowledging that the most appropriate post-transaction feedback opportunity may vary by the type of service.
- *Data-Driven Decision-Making:* Data gathered by agencies (e.g., administrative data, systems data, digital analytics data, post-transaction feedback data, etc.) should form a customer listening data ecosystem that informs agency decision-making, goalsetting, and strategic planning. Data should be made available to staff directly managing service delivery, as well as leadership overseeing agency priority-setting on a regular and consistent basis. Agencies should also ensure staff exist within the organization that have the skillset and experience to analyze and communicate various data. Where practical, agencies should integrate customer experience measures into existing dashboards of operational metrics in ways that consider specifics of service delivery, such as differentiating between channels, regions, and customer segments.
- *Voice of the Customer (VOC) Programs:* A VOC program is a systematic approach for collecting, analyzing, and taking actions based on the customer feedback data that an organization collects. Data types may include structured sources (e.g., end of interaction; end of journey feedback surveys), and unstructured sources (e.g., emails, online reviews, social media messaging, chats, and call center notes). A mature VOC program includes three core elements: 1) an enterprise surveying platform that is able to solicit, ingest, analyze, and visualize customer feedback, as well as integrate with operational, digital analytics, and case management data; 2) sufficient agency staffing to monitor, analyze, and interpret key transaction points and trends across time; and, 3) a business process change whereby agencies are engaging leadership and frontline staff with the data to arrive at shared understanding of customer concerns and to co-design and implement improvements.

280.10 How should customer experience be reflected in an agency's Annual Performance Plan?

Agency Annual Performance Plans should include indicators for outcomes related to customer experience and relevant service levels. This should include customer feedback data collected as described below in section [280.14](#), as well as service level indicators (e.g., wait times, website analytics) appropriate to their program. More information on integrating this information into the Annual Performance Plan is included in section [210](#).

280.11 What programs have been identified as High Impact Service Providers (HISPs)?

As defined in E.O. 14058, High Impact Service Providers are those Federal entities designated by OMB that provide or fund high-impact customer-facing services, either due to a large customer base or a high

impact on those served by the program. The list of HISPs is reviewed and updated periodically by OMB. The current list of HISPs is available at www.performance.gov/HISPs.

The senior accountable official for the HISP (or appropriate senior official) shall coordinate activities described in section [280.12](#) for the enterprise. In addition to relevant program and field office staff, these activities should serve as intra-agency convening mechanisms around the customers served and involve cross-cutting representation from mission support functions within the agency, including the Chief Information Officer, Chief Human Capital Officer, Chief Financial Officer, Performance Improvement Officer, Evaluation Officer, Chief Data Officer, and Customer Experience / Digital Service Teams.

280.12 What steps should HISPs take to manage customer experience?

Given the significance of the services they provide and the requirements in E.O. 14058, HISPs must:

- In collaboration with OMB, designate at least two (2) priority services, in alignment with the requirements of the 21st Century IDEA and guidance outlined in this section, for focused assessment and the activities of this guidance (by May 31, 2024);
- Collect customer feedback in accordance with section [280.14](#) for identified moments that matter along designated service journeys (e.g., no longer sufficient to only report general call center satisfaction measures without the context of a service journey);
- Submit this feedback data to OMB at a minimum quarterly, until feedback data is provided directly to Performance.gov through an open application programming interface (API) (once developed). Quarterly submissions will be due the last business day of the month following the last day of the quarter; for FY 2024, these due dates are January 31, April 30, July 31, and October 31, 2024;
- Conduct an annual CX Capacity Assessment (submitted to OMB by February 23, 2024) for both HISPs and HISP-maintaining departments and discuss the resulting findings with OMB at an annual CX Deep Dive (completed by April 14, 2024);
- Develop a draft CX Action Plan (submitted to OMB by May 31, 2024) and final CX Action Plan (submitted to OMB, along with the budget submission, by September 9, 2024) annually for each designated HISP and HISP-maintaining department, with a focus on improvement actions for designated services; and,
- As directed in E.O. 14058, embed more customer-focused practices into their service design and delivery such as conducting service assessments, customer research through qualitative and quantitative research and journey mapping, approaching more holistic calculations of burden (learning, compliance, and psychological costs, in accordance with [OMB Memorandum M-22-10](#)) for their service transactions and full journeys, and continually user-test program elements with customers to refine and improve.

280.13 How should HISPs designate priority services?

Annually, based on an agency's knowledge of existing services (e.g., as in alignment with an agency's list of services in the Federal Services Index), each HISP is required to designate two or more of these services for targeted customer experience improvement efforts. These services will be the subject of CX Capacity Assessment and Action Plans, will be highlighted on www.performance.gov/cx, and will be the focus of customer feedback data submitted quarterly and shared publicly.

As HISPs determine which services to designate, they should consider designating priority services that focus on the one or two most important things the HISP does to serve its customers (e.g., high percentage of the population served, high volume of annual transactions, outsized impact in the lives of the people served [i.e., where successful use of the services has a consequential impact on the livelihood of an individual group, such as Tribal members' access to trust assets, an individual applying for benefits under the Energy Employees Occupational Illness Compensation program]). Importance can be defined in several different ways, but each HISP should be able to clearly articulate why choosing this service drives value to the organization and to customers and contributes to the performance of the agency, and should utilize data to determine which services to prioritize.

HISPs should also consider [OMB Memorandum M-22-10](#), of April 13, 2022, *Improving Access to Public Benefits Programs Through the Paperwork Reduction Act* when choosing services to designate. OMB Memorandum M-22-10 provides guidance to help agencies identify and reduce burdens related to applying for and maintaining eligibility for public benefits programs, with a particular focus on members of underserved and marginalized communities.

HISPs should remember that services require action and should be considered through the lens of the customer: services involve actions taken by customers to accomplish tasks, receive benefits, submit information, or otherwise engage with an agency. HISPs should also consider how designated services relate to their agency strategy plans, priority goals, learning agendas, equity plans, organizational health measures, and other planning processes.

280.14 How should HISPs collect and submit "post-transaction" feedback data?

To assist in developing comparable, government-wide scores that enable cross-agency benchmarking (when relevant), identify those improvements and service elements that most effectively improve trust for different service types, and reduce burden on the public, programs providing services to the public should measure their touchpoint and transactional performance in line with industry leading practices for customer feedback surveys.

OMB outlines three types of customer feedback surveys:

- *Post-Interaction*: The customer recently completed (generally defined as within the last 48 hours) a single, stand-alone interaction (e.g., a survey after viewing a website to find a piece of information to initiate a service journey, or speaking with a contact center employee).
- *Post-Service Journey*: The customer completed a series of interactions or a multi-stage process of a service (e.g., a survey after the process for applying for and receiving Federal student aid, filing an individual tax return, or a specific period of someone's life that included transacting with services such as one-month post-partum).
- *Relational*: The customer completed multiple transactions, service journeys, or a lifetime of engagement with the agency (e.g., a survey after a customer's most recent year of interacting with an agency or program) and is asked to reflect on their transactions at a point-in-time when a sample is collected, rather than based on a single, specific transaction.

HISPs must implement at least one customer feedback survey for each of their current designated services. If only doing one survey for a service, HISPs must implement a customer feedback survey at the completion of the service journey. HISPs may deploy multiple or as many post-transaction customer feedback surveys per designated services as needed and appropriate. HISPs should work with OMB to determine opportunities for post-transaction customer feedback that are most relevant and appropriate for their designated services, and provide data that enables the ongoing delivery and improvement of the services.

The below framework, including question wording, response architecture, and branching logic, seeks to reduce burden on the public and to assist in developing comparable, government-wide customer experience measures that can be shared publicly. All HISPs should consider switching to this model, although exceptions will be made for HISPs that have demonstrated success with the current model and facility with and capacity to use more granular data. All post-transaction customer feedback surveys will require PRA approval under the *OMB Circular A-11 Section 280 Umbrella Clearance*. HISPs that shift to this more streamlined framework will be part of discussions regarding results of this model as OMB considers further implementation in FY 2024.

HISP customer feedback surveys must include:

<p>Q1 Required Wording: This [interaction / service] increased my trust in [High Impact Service Provider].</p>

<p>If a HISP would prefer to use a statement with a Likert scale rating, rather than a binary question, for respondent's agreement with that statement, adapted wording and scale will be reviewed as part of the PRA approval process. Please note that if a HISP does employ a 5-point rating scale, OMB will work with them to understand whether and how different ratings (3, 4, 5 / 5) will be included 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 reporting.</p> <p>Depending on the service and transaction context, other iterations of wording for this question could include sentences such as:</p> <ul style="list-style-type: none"> • <i>Based on my experience calling the IRS, I trust IRS is working in the best interest of the American public.</i> • <i>Having completed FAFSA, I trust FSA to deliver on its responsibility to students.</i>

If respondent provides "thumbs up" or 5-point rating:

Q2a Required Wording: What about this interaction made the difference? (<i>Tap/Select all that apply</i>)			
	Driver <i>(Not shown)</i>	Corresponding Statement <i>(HISPs may choose one statement per category to be shown in a multiple-selection question format.)</i>	Status
1	<i>Effectiveness</i>	My need was addressed. My issue was resolved. I found what I needed. My question was answered. <i>(Or similar.)</i>	Required
2	<i>Ease</i>	It was easy to complete what I needed to do. It was easy to find what I needed. <i>(Or similar.)</i>	Required
3	<i>Efficiency</i>	It took a reasonable amount of time to do what I needed to do. I found what I needed on the site quickly. <i>(Or similar.)</i>	Required
4	<i>Transparency</i>	I understand what was being asked of me throughout the process. I understand the reason for the [Agency/Program/service]'s decision. <i>(Or similar.)</i>	Required if applicable
5	<i>Humanity / Equity</i>	I was treated fairly. <i>(Or similar.)</i>	Required if applicable
6	<i>Employee Interaction</i>	Employees I interacted with were helpful. The call center representative was committed to solving my problem. <i>(Or similar.)</i>	Required if applicable
7	<i>Other</i>	Something else. None of the above. <i>(Or similar.)</i>	If applicable
<i>HISPs are encouraged to the extent possible to simplify statements to 1-3-word clauses and use iconography as relevant.</i>			

If respondent provides "thumbs down" or 1-4-point rating:

Q2b Required Wording: What could have been better? <i>(Tap/Select all that apply)</i>			
	Driver <i>(Not shown)</i>	Corresponding Statement <i>(HISPs may choose one statement per category to be shown in a multiple selection question format.)</i>	Status
1	<i>Effectiveness</i>	My need was not addressed. My issue was not resolved. I did not find what I needed. My question was not answered. <i>(Or similar.)</i>	Required
2	<i>Ease</i>	It was difficult to complete what I needed to do. It was difficult to find what I needed. <i>(Or similar.)</i>	Required
3	<i>Efficiency</i>	It took too long to do what I needed to do. I did not find what I needed on the site quickly. <i>(Or similar.)</i>	Required
4	<i>Transparency</i>	I did not understand what was being asked of me throughout the process. I did not understand the reason for the [Agency/Program/Service]'s decision. <i>(Or similar.)</i>	Required if applicable
5	<i>Humanity</i>	I was not treated fairly. <i>(Or similar.)</i>	Required if applicable
6	<i>Employee Interaction</i>	Employees I interacted with were not helpful. The call center representative was not committed to solving my problem. <i>(Or similar.)</i>	Required if applicable
7	<i>Other</i>	Something else. None of the above. <i>(Or similar.)</i>	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? <i>(Or similar.)</i>
[Free text response] <i>May be excluded if format, such as an interactive voice response (IVR)-based survey, does not enable.</i>

Additional considerations:

- If applicable and appropriate, HISPs may include additional questions that enable the HISP to collect more useful data, such as a question regarding the purpose of a visit or call. The best practice is that the total survey length should be no more than 15 questions and five minutes of burden (in addition to accounting for the PRA considerations in section [280.9](#)). Any additional questions should be placed after the required questions outlined above. All questions on the survey must be optional for respondents, meaning that a respondent's decision to not answer one or more questions on the survey will not in any way affect the respondent's receipt of benefits or services, subject them to any penalties, or otherwise negatively impact them.
- HISPs should administer surveys by applying practices that promote the validity, accuracy, and utility of the data and that facilitate ease of response. For example, to promote ease of response, HISPs can use methods such as presenting only a single-screen (even on a mobile device) version of the survey.
- To the extent possible, HISPs may use sampling techniques on high-volume transactions to split a long survey into several shorter surveys to reduce burden on the respondents while collecting sufficient data from a larger pool. HISPs must consult with OMB through the PRA approval process prior to implementation to ensure survey validity.
- HISPs should deploy post-transaction feedback survey(s) in the channels (e.g., mail, phone, online, email, texting, in-person, etc.) that are appropriate and relevant to the experience of the customers for that service (e.g., if a service includes visits to a government webpage, surveying online makes sense; if a service is paper-based, a paper survey with both mail-in and phone option is appropriate).

- OMB will work with HISPs to determine whether they should use binary questions or whether they should use Likert-scale, given the relevant context of each particular HISP. In working with HISPs to assist them in making this determination, OMB will consider factors including data quality and validity, aggregating metrics, and granularity.

How to Submit Feedback Data to OMB

HISPs are required to report quarterly post-transaction feedback data on each of their current designated services (i.e., one post-transaction feedback survey for each current designated service, each quarter). HISPs may report data from multiple post-transaction feedback surveys for each designated service, if relevant and appropriate. HISPs will be asked to identify the point-in-time of each post-transaction feedback data collection during reporting. HISPs must also submit raw data for Questions 1 and 2 so that OMB may conduct analysis on drivers tapped for individual trust responses. A data reporting template will be provided on the [CX MAX Community page](#). The template includes instructions, a section for reporting on the customer experience measures outlined in this section, a placeholder for program-specific service-level indicators as appropriate, and space to summarize recent accomplishments.

Submissions will be due the last business day of the month following the last day of the quarter: for FY 2024, these due dates are January 31, April 30, July 31, and October 31, 2024. HISPs (many of which are collecting data in real-time) should submit their data as soon as they are able following the last day of the quarter. Feedback data will be made available publicly on performance.gov in coordination with OIRA. Agency-specific post-transaction feedback data are currently published on performance.gov/cx and can be included in the Annual Agency Performance Plan (see section [280.10](#)). A Federal-level trust measure and success target is published on <https://www.performance.gov/pma/cx/data/>.⁷

When OMB and HISP designate a new service, the HISP has a maximum of 365 calendar days from the date of designation to develop a post-transaction feedback data collection survey for the designated service and to begin quarterly data reporting.

280.15 What shall HISP CX Capacity Assessments and Action Plans include?

The content of CX Capacity Assessments shall address the core CX functions at the HISP enterprise-level outlined in section [280.7](#) as well as the results of designated service assessments. Further, HISPs maintaining department-level CX organizations will also be asked to complete an annual CX Capacity Assessment.

The content of the CX Action Plans shall address specific delivery improvements to designated services, as well as actions to improve the maturity of CX and service delivery capabilities and capacity. This includes updates to current year priorities, adjustments to the following year's priorities, and proposals to be considered in the formulation of the next President's Budget (in this case, FY 2026). Actions should address pain points identified through service assessments, customer feedback, human-centered design research, and other evidence generation activities. CX Action Plans should focus on customer outcomes and should communicate what success will look like in terms of what any proposed improvements will mean for an individual customer using the service. Commitments will be made publicly available on performance.gov/cx.

⁷Agencies seeking to create an agency-specific CX reporting website (i.e., agency.gov/cx) highlighting their CX efforts should contact OMB so that reporting duplication and overlap can be minimized.

An annual HISP CX Capacity Assessment and Action Plan template will be made available on the [CX MAX Community page](#).

280.16 How should agencies participate in designated Life Experiences?

OMB will manage the selection of a limited number of customer life experiences to prioritize for Government-wide action to improve customer experience in line with the cadence of the President's Management Agenda. These designated life experiences are those that require members of the public to navigate a service or services across the boundaries of multiple Federal programs, agencies, or levels of government. OMB will provide leadership, policy consultation, and reporting in accordance with E.O. 14058, a governance structure, and support to agencies through the President's Management Council. The charters for these designated Life Experience portfolios will be made publicly available at <http://www.performance.gov/cx>. Additionally, individual Life Experience project milestones and deliverables will be made available at <https://www.performance.gov/pma/cx/strategy/2/>.

The full Life Experience program cycle includes a *Discovery* phase to understand people's experiences and opportunities for improvement, a *Design* phase of building and testing solutions, a *Delivery* phase to scale the interventions and products that work, and continuous *Measurement* to ensure the designs are working to reach outcomes. Agencies and their staff will participate in a variety of ways across Life Experience portfolios and projects, including serving as subject matter experts to contribute to and review materials, serving on interagency delivery teams, providing programmatic leadership for a given project, providing data that enables more streamlined delivery, supporting procurement by leveraging best-in-class contracting vehicles, or other ways of supporting projects.

Per E.O. 14058, the Director of OMB shall work with the head of each relevant agency to help resolve issues related to overlapping responsibilities among agencies, to address barriers serving customers across multiple agencies, and to coordinate activities to improve customer experience and services delivery when the primary responsibility among multiple agencies is unclear.⁸

⁸ [Section 5\(d\)](#), E.O. 14058 of December 16, 2021, on *Transforming Federal Customer Experience and Service Delivery To Rebuild Trust in Government*, available at <https://www.federalregister.gov/documents/2021/12/16/2021-27380/transforming-federal-customer-experience-and-service-delivery-to-rebuild-trust-in-government>.

