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Digital



JUNE 27, 2019

Texas Government Data Forum

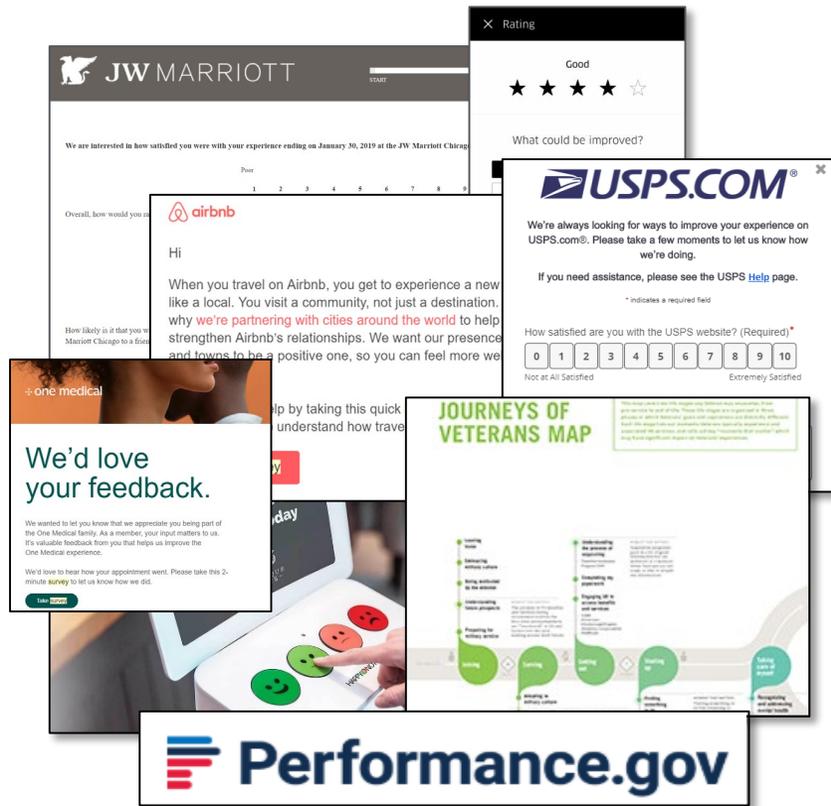
Agenda

1 Introduction to Experience Measurement

- *Traction in Government*
- *Surveys*
- *Text Analytics*
- *Closed Loop Feedback*

2 USPS Case Study

Feedback is everywhere



Great brands put feedback at the center of how they operate.

Headlights to see the road ahead

Experience metrics are leading indicators for organizational performance. Improvements in experience metrics drive:

- Improved mission effectiveness
- Increased trust
- Reductions in cost

Engine for engagement with your customers and organization

Experience measurement enables organizations to:

- Engage customers in real-time experience improvements
- Identify actions to improve operations to meet customer and employee needs

Does your organization take control of feedback and make it valuable?

Customer Experience is becoming increasingly important in state government

We were able to create multiple extensive surveys that would have been costly on another platform; Qualtrics services the entire Army National Guard, so we should ultimately be saving money. The system is also easy to use and detailed. We wouldn't have been able to gain as much detailed insight without using this platform.

— Utah Army National Guard Language Program

"Marylanders expect the best possible customer service from their state government

[...]

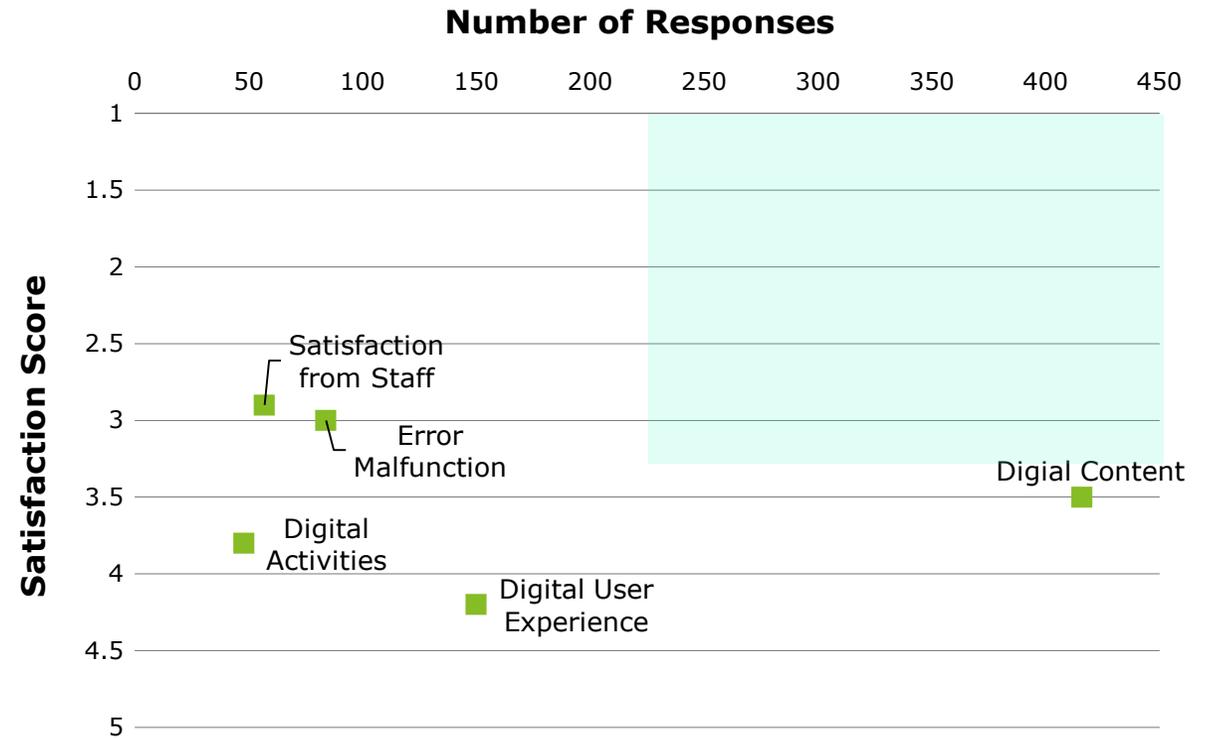
*We will ensure continued improvements across all Maryland state agencies by finally giving our state employees the **leadership, the training, and the tools they need to be successful**"*

- LARRY HOGAN

Governor, State of Maryland

Launch of State Customer Service Initiative

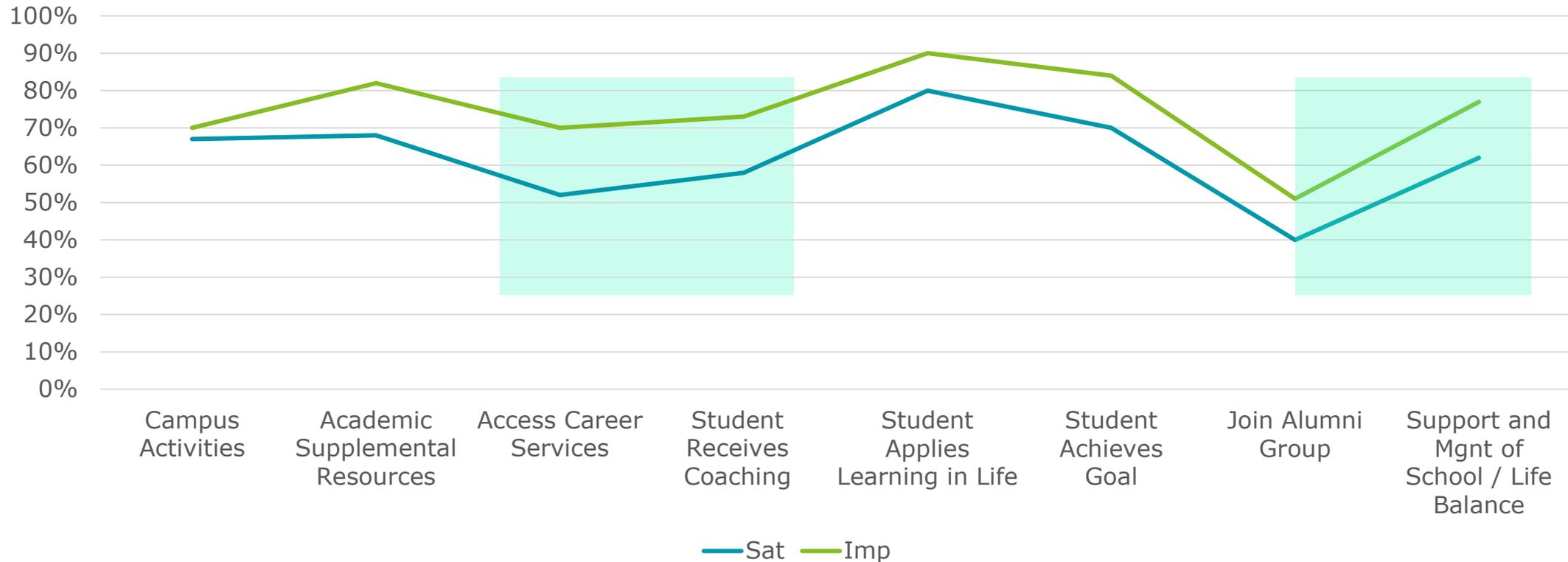
Focusing on Volume along with Satisfaction focuses effort on high volume/moderate satisfaction issues



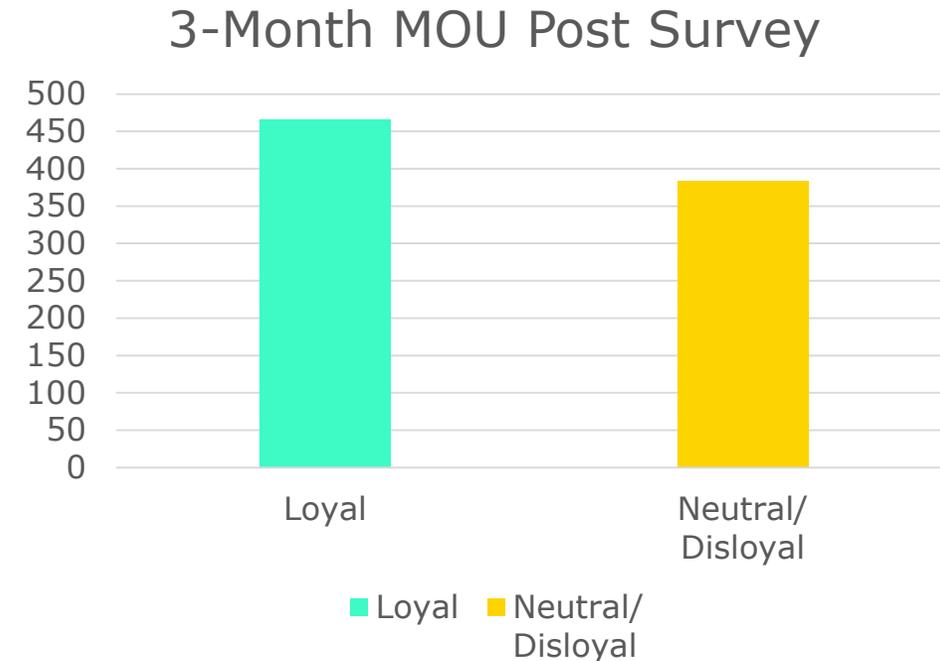
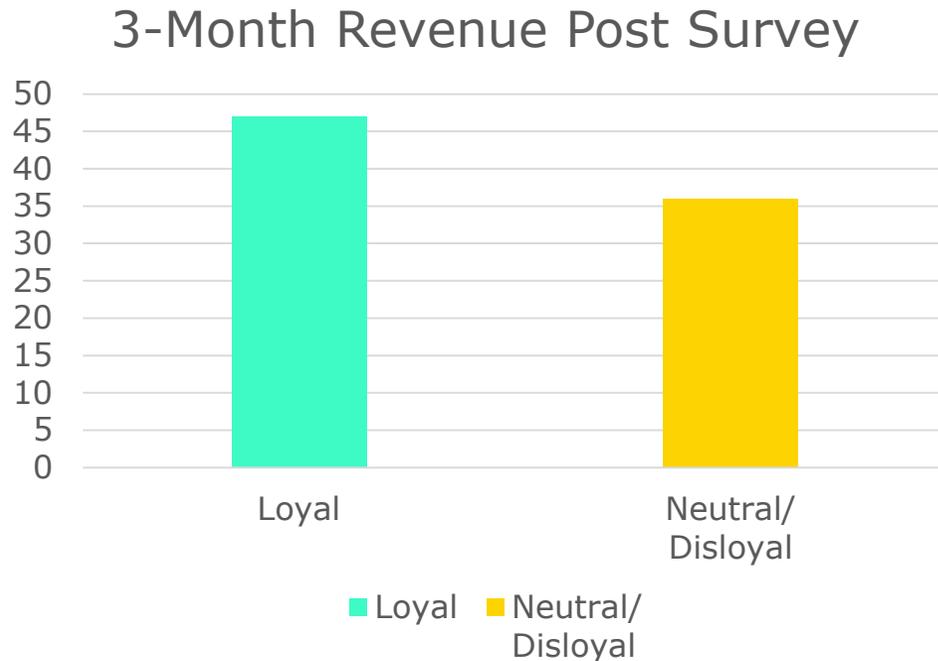
Source: Google Play Data 2017-Current
Note: Data Stored in Medallia

Focus on areas with highest gaps between importance and satisfaction

Student Experience Journey Map

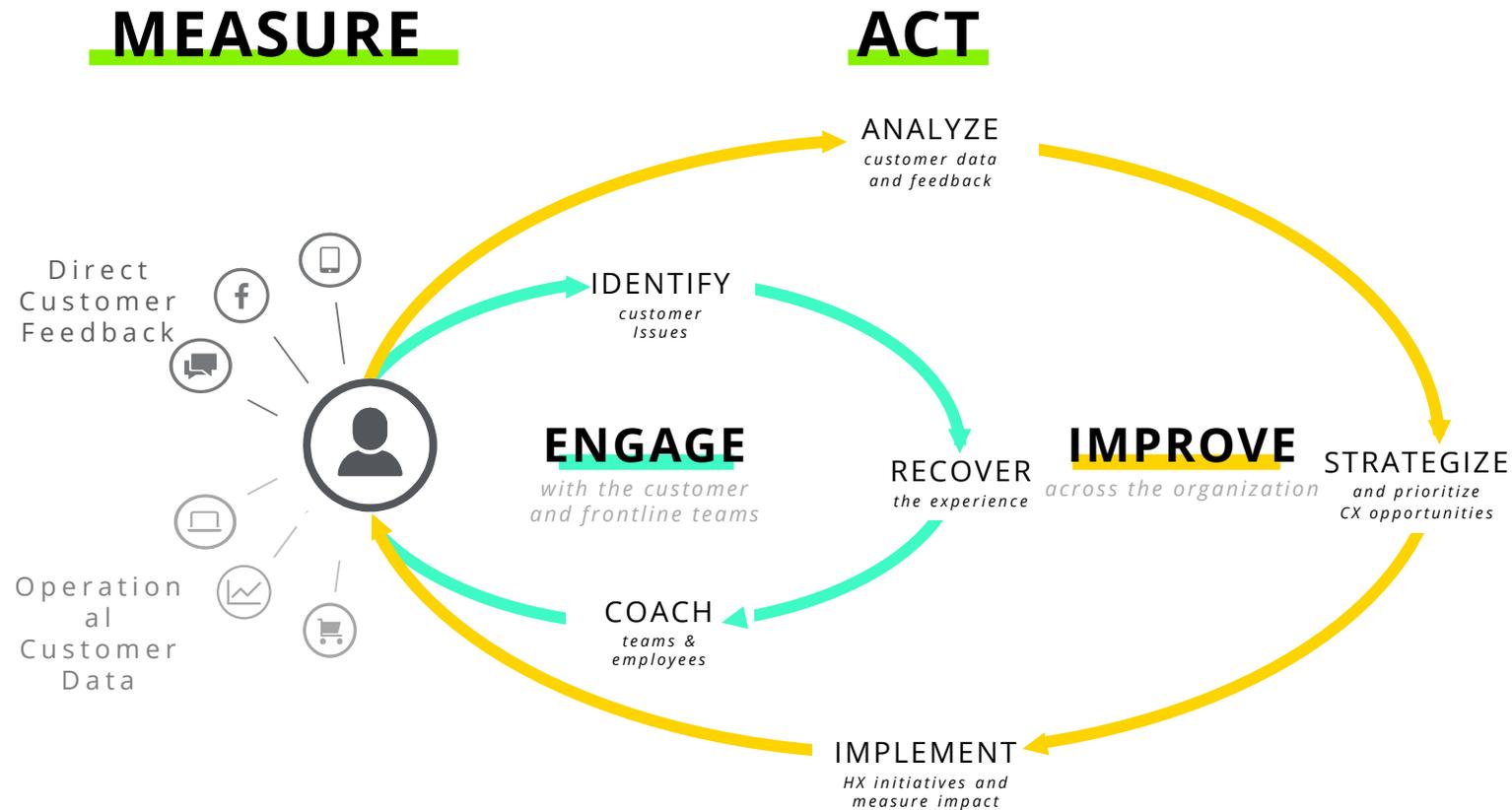


Compare outcomes based on loyalty/satisfaction to build the business case



Loyal prepaid customers **spent 30% more** and **use 22% more minutes** than other pre-paid customers in the three months after they took the Survey

Use Closed loop feedback to improve the resident experience based on data



Engage – Inside Loop

- Frontline responds to customer feedback to resolve outstanding issues
- Managers use feedback from customers for employee coaching and learning opportunities
- Teams identify obstacles that impede their ability meet customer needs and shares feedback with organization

Improve – Outside Loop

- Analyze customer feedback, operational data and employee suggestions to identify opportunities to improve the experience
- Review, size and prioritize initiatives
- Design, test and implement improvements
- Measure impact

United States Postal Service

Case Study

USPS: Improving CX at Scale

USPS is a large, complex organization with a growing delivery footprint and a declining volume of mail delivered daily to even the most remote areas of the country.



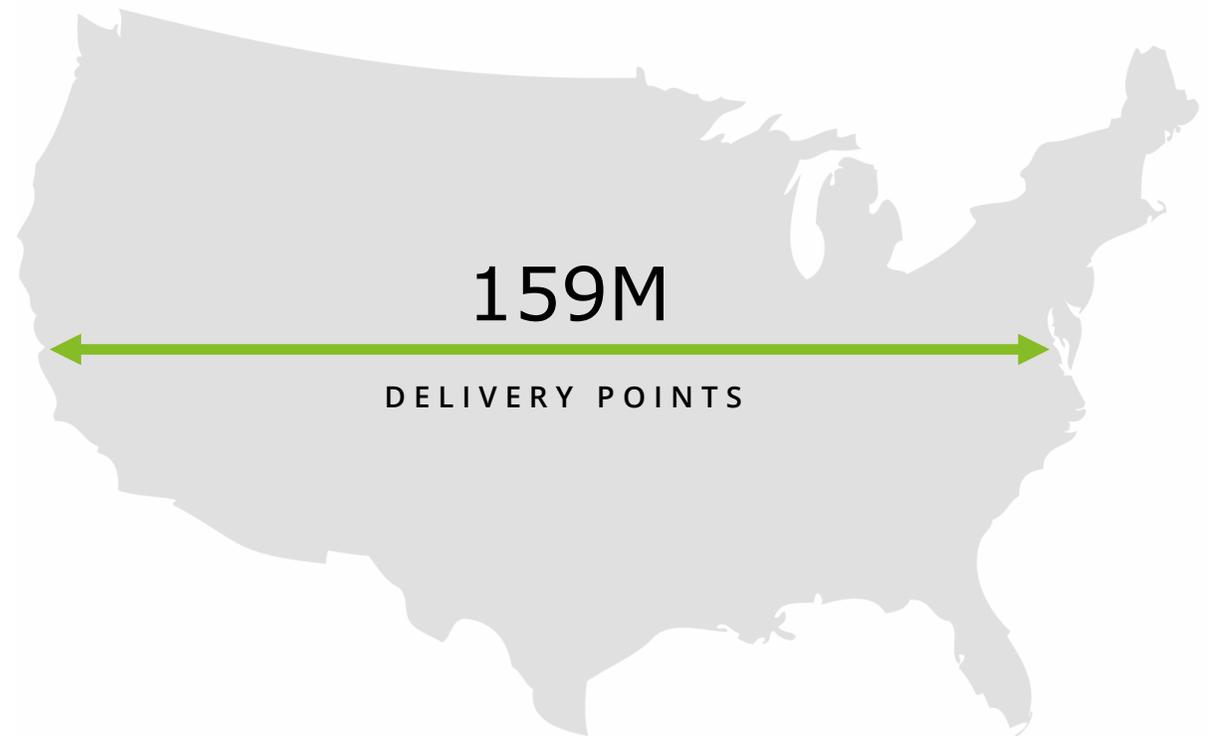
USPS has
+31K retail
outlets



+600K
employees with a
strong union
presence

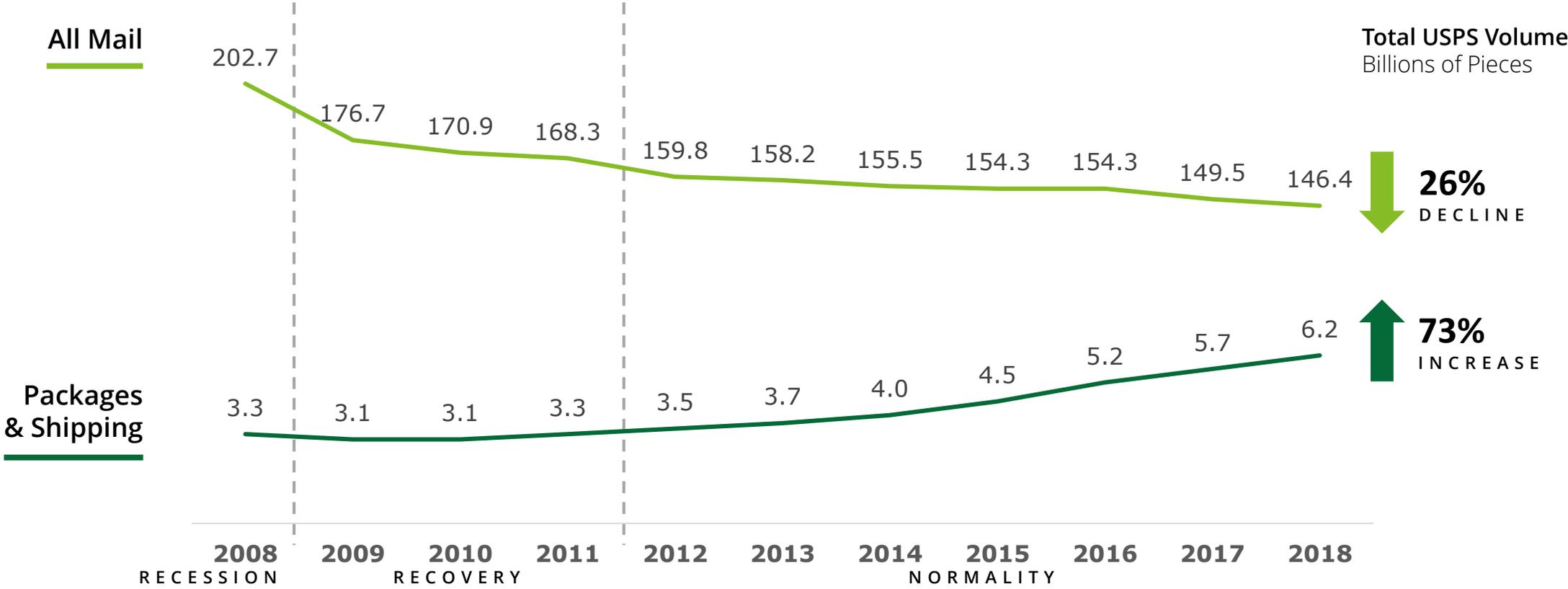


If it were a private sector
company, USPS would rank
37th in the Fortune 50



A Changing Business

As USPS business shifted toward packages, it found itself less prepared for the high engagement and increased customer interactions that followed – customer friction resulted in exponential increases in call volume.



Challenges to Improving USPS Tracking

USPS lacked important feedback tools to diagnose the root cause of customer friction, and senior leadership attributed the surprising increase in call volume almost entirely to a lack of digital effectiveness.

USPS Tracking Experience

2012

Expected Delivery Day: Friday, September 19, 2014

Product & Tracking Information

Postal Product: Priority Mail 2-Day™ Features: \$50 insurance included USPS Tracking™

DATE & TIME	STATUS OF ITEM	LOCATION
September 17, 2014, 4:57 pm	Departed Post Office	CHAPEL HILL, NC 27514
Your item has left our acceptance facility and is in transit to a sorting facility on September 17, 2014 at 4:57 pm in CHAPEL HILL, NC 27514. No further information is available for this item.		
September 17, 2014, 4:17 pm	Acceptance	CHAPEL HILL, NC 27514

2017

Expected Delivery Day: Thursday, November 3, 2016

Product & Tracking Information

Postal Product: First-Class Package Service Features: USPS Tracking®

DATE & TIME	STATUS OF ITEM	LOCATION
November 2, 2016, 7:28 am	In Transit to Destination	
The item is currently in transit to the destination as of November 2, 2016 at 7:28 am.		
October 31, 2016, 7:28 pm	Arrived at USPS Origin Facility	SANTA CLARITA, CA 91383
October 31, 2016, 6:13 pm	Accepted at USPS Origin Facility	OXNARD, CA 93033

Shifting Priorities

USPS had many digital priorities, although tracking was the clear priority of its customers.

Siloed Customer Data

Customer data sources were reviewed only by the functional area to which they pertained.

Dated digital diagnostics

USPS had a Foresee survey and little else to diagnose customer friction in the digital interaction.

Unclear Ownership

Numerous parts of the organization owned parts of the experience, with little collaboration.

Slow Pace of Progress

“Test and refine” improvement had been slow to non-existent with little new concept testing

Data-Driven Improvements

USPS needed to identify the drivers of satisfaction and integrate other relevant data sources to enable a holistic view of customer priorities and tackle improvements in a cross-functional way.

PHASE I

Modernize Measurement

Update customer feedback toolkit, portfolio of satisfaction surveys, and integrate other data sources for a composite view of customer experiences to drive prioritization

PHASE II

Shared Governance Model

Break down siloes within the organization and increase cross-functional collaboration.

Optimizing the Digital Experience

Test and Refine

Rapidly prototype new solutions, track results, and refine approaches in near real-time

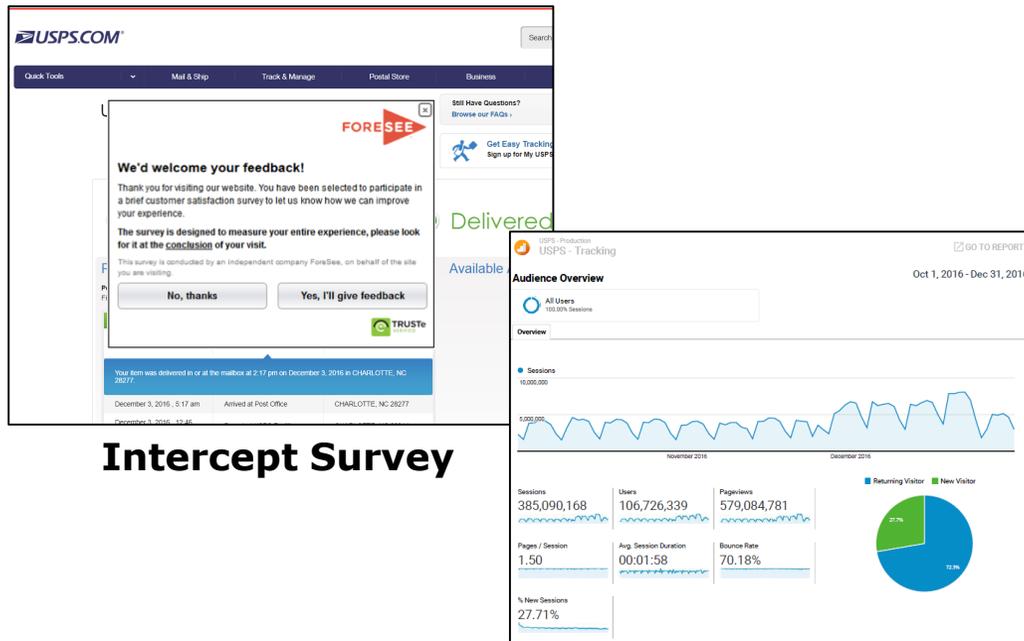
Co-Creation with Customers

Quickly incorporate customer feedback to identify problem areas and influence prototype designs

Modernizing the Digital Toolkit

USPS made the tracking experience its primary focus and moved quickly to upgrade its tools to assess UX within the digital channel, directly on the tracking results page.

Modernizing Digital Capabilities



Intercept Survey

Google Analytics

Reports Linking Scores to Observation

Rank	Package Status	% of Survey Respondents	NPS
1	Out for Delivery	7%	9
2	Delivered	1%	9
3	Pre-Shipment	1%	7
4	Accepted	1%	7
5	In-Transit	1%	7
6	On-Its-Way-to-USPS	1%	7
7	Status Not Available	1%	7
8	Alert	1%	7
9	In Transit, Delayed	1%	7

Forming a Composite Customer View

Other data sources were acquired from owners outside the digital channel, with both operating data and customer contact data added to form a composite view.



Augmenting the site survey with new intercepts **linked customer sentiment to the observed experience** on usps.com.

More granular monitoring of **call center "reason" categories** directly informed digital priorities.

Stronger data **illuminated previously hidden operating challenges** and enabled them to be addressed.

Use of **geolocation enabled monitoring** of delivery scans outside proximity to delivery point geo-coordinates.

Putting Data into Action: The Tracking Working Group

Members

VP, Enterprise Analytics (Chair)
SVP, Sales & Customer Relations
VP, Product Management
Exec. Director, Brand Marketing
VP, Information Technology
VP, Delivery Operations
VP, Retail Operations
Director, Customer Experience
Director, Product Tracking

Tracking Working Group Core Tenets



Two Pizza Team

The Working Group was comprised of only high-level individuals with authority to make decisions and affect change. Keeping the team small, and focused allowed for a faster pace and reduced complexity in coordination.



Business Process Owners

Each member of the task force owned a portion of the delivery and tracking experience. This ownership provided a shared sense of accountability for solutions and openness to work through cross-functional CX imperatives.



Regular Meeting Cadence

Rather than wait for issues to arise, the Tracking Working Group would meet once a month to discuss progress, uncover barriers / issues, and maintain momentum against improvement initiatives.

Co-Creating with Customers

Quick customer feedback on potential concepts, like language testing on all scan events, allowed USPS to identify and correct drivers of poor customer experience.

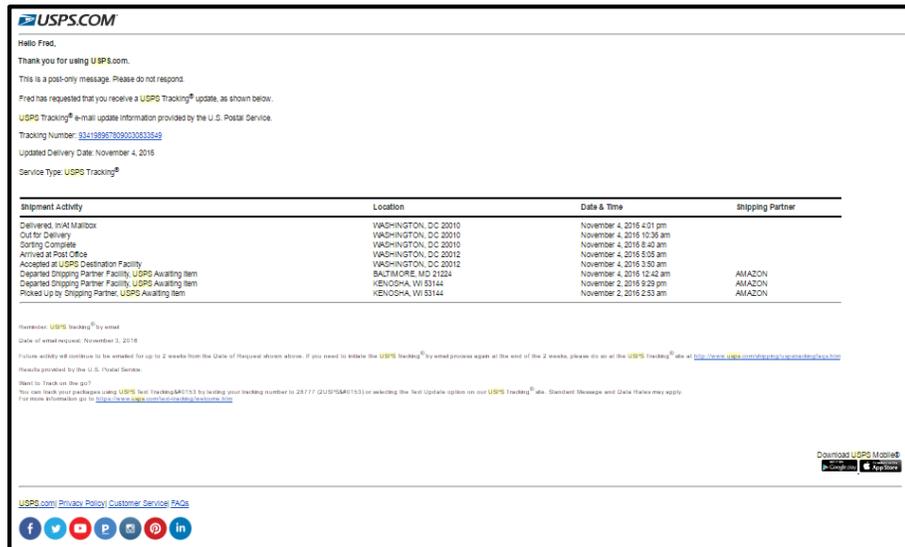
Customer Language Preference Testing

Current Scan Events	Simplified Language	Conversational Language
Picked Up By Shipping Partner	Package Picked up by (Partner). USPS Expecting Package.	Your Package Was Picked Up By (Partner). USPS Is Expecting Your Package Soon.
Pre-Shipment Info Sent to USPS	USPS Received pre-shipment information. USPS is Expecting Package.	USPS Received Shipping Information About Your Package. We Look forward to Shipping Your Package Soon.
Accepted at USPS Destination Facility	Package Arrived at USPS Facility for Final Processing	Your Package Arrived USPS' (Location) Facility
Accepted at USPS Origin Facility	USPS Accepted Package for Processing	Your Package Has Arrived in (Location). After we do some quick sorting, it will be on its way.
Departed Shipping Partner Facility	Package on its way to a USPS Facility	Your Package Departed (Partner) Facility. USPS Is Expecting Your Package Soon.
Arrived at USPS Origin Facility	Package Arrived at USPS Facility for Processing	USPS Has Sorted Your Package and Its Ready to Depart Our Facility
Undeliverable as addressed	Delivery Attempted, Package Undeliverable As Addressed	USPS Was Unable to Deliver Your Package. The Address May Be Incorrect, Incomplete or Illegible.
Arrived at USPS Facility	Arrived at (Region Name) USPS Facility	Your Package Has Left (Location) and Its On Its Way To (Location).
Departed USPS Facility	Departed USPS Facility for Transit	Your Package Has Arrived in (Location). After we do some quick sorting, it will be on its way.
Shipping Label Created	Shipping Label has been Created. USPS is Expecting Package	A Shipping Label Has Been Created. USPS Looks Forward to Shipping Your Package Soon.
Out for delivery	Package Has Left Post Office for Delivery Today	Your Local USPS Carrier Has Your Package and Has Left the Post Office for Delivery
Acceptance	USPS In Possession of Package	USPS Now Has Your Package. After we do some quick sorting, it will be on its way.

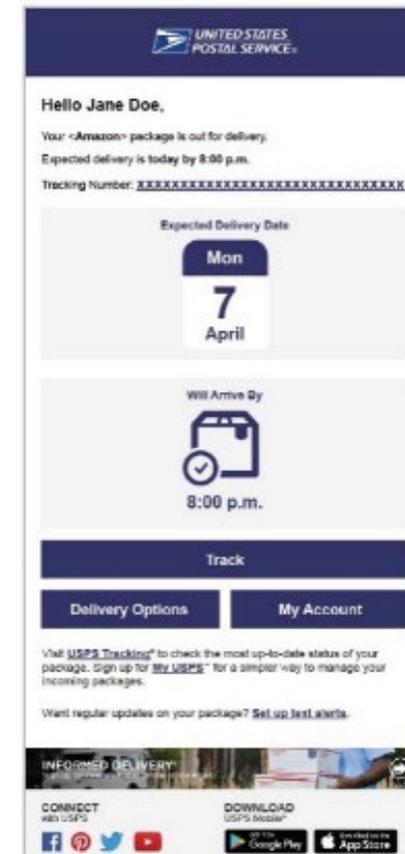
Rapid Prototyping Solutions

Rapid prototyping and testing offered data on the appeal and clarity of new concepts such as proactive email and SMS text notifications.

Legacy USPS Email Notification

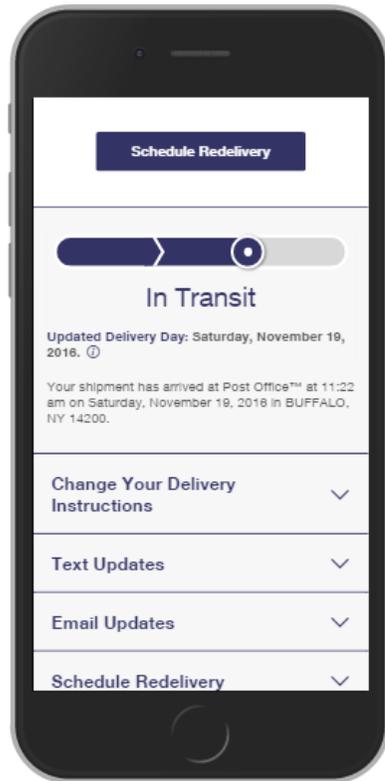


Revised USPS Email Notification



Impacts of USPS Tracking Initiative

By modernizing the means through which it collected and analyzed data, USPS was able to accelerate solutions that are integrated across the business and better meet customers' needs.



Redesigned Tracking Application

Simplified, mobile-optimized design for all devices, giving customers more control over what events are shown

77% of customers reported an improved tracking experience

New Features and Enhancements

USPS has implemented several new capabilities based on data and rapid customer testing

8 point increase in CSAT scores for Tracking Application

Renewed Organizational Connections

By bringing siloed parts of the organization together on the tracking problem, USPS was able to reignite connection points in pursuit of a culture of creative problem solving

First of its kind holistic approach to the package delivery experience

Data-Driven Redesign of Tracking Experience

By taking a **data-first approach** to unpacking the tracking experience, USPS was able to cut through the clutter and key in on key failure points, aligning the organization around priorities.

USPS Challenges

- **Siloed customer data** obscured true nature of the tracking problem
- The organization was beset with **shifting priorities** in the absence of authoritative data
- Improvements to the tracking experience had **unclear ownership** across functions
- Improvement activities were met with organizational inertia, **slowing the pace of progress**

What We Did

- Deployed **modern feedback** tools, and increased feedback 10x via intercept surveys on the tracking results page
- Obtained **data from outside the digital touchpoints** to help prioritize digital opportunities.
- Chartered the cross-functional **Tracking Working Group** to collectively decide on a shared course of action
- Used customer data and analytics to institute a culture of **test and refine**

What We Discovered

- Several **key failure points** in the customer journey had outsized impact on customer satisfaction and drove call center volume
- Connected **specific design and language elements** of tracking application to low NPS

Summary

- 1** Constituent and Employee Feedback is becoming increasingly important in government
- 2** Surveys are a critical tool to gathering feedback
- 3** Maximum benefit from surveys requires
 - *Text analytics to mine insights that cannot easily be captured with multiple choice questions*
 - *Linking survey results to operational and outcome data to identify root causes and impact of improving satisfaction*
- 4** Surveys without action is insufficient and counterproductive.
- 5** Organizations need to implement a closed loop feedback system to act on feedback

Questions?

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