# The Top 5 Ways to Optimize Agency CX

Introduction

Over the last year and a half, agencies have reevaluated their customer experience. Citizens expect information and services to be on-demand when delivered through digital channels, but legacy systems and outdated processes can hinder modernization efforts.

As speed and efficiency are valued more than ever in citizens' digital experience, how can agencies keep up at speed and scale?

In a recent webinar sponsored by Salesforce, Michael Hornsby, Salesforce's director of customer success, and Chris Radich, Salesforce's vice president of digital transformation, discussed the top trends in federal CX optimization, and how new technology can improve CX. Here are some of their key takeaways.
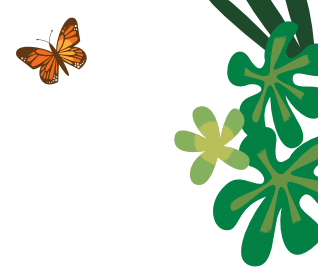
1. Develop Self-Service Portals

The entry point for CX transformation, according to Radich, is agency support online through self-service. While agencies are generally able to meet phone demand at scale, the call volume during the pandemic was overwhelming to agencies. A simple solution is to develop a portal for citizens to set up an account tailored to their individual needs and access the services they need directly.

"Phone channels have often not been able to satisfy case demand and close them out in a timely fashion because volume has spiked," Radich explained. "We've seen self-service portals popping up and chatbots to drive case deflection."

However, the most important aspect for agencies to consider if they are trying to modernize their portal or web presence is willingness to consolidate their current web presence and allow a self-service portal to take its place.

"Self-service portals or digital experience portals should leapfrog the previous approach, with maybe a content management system or custom web development framework to support it," Hornsby said.

Salesforce recently worked with a large federal agency to create a portal that establishes a single front door for constituents to fill out forms, check loan status and apply for disaster assistance.

"With Salesforce, [the agency] was able to consolidate 150 web resources into a single front door," Hornsby said. "Agencies should start thinking about self-service as a single technology program combined with phone support – don't treat these differently."

> **Agencies should start thinking about self-service as a single technology program combined with phone support — don't treat these differently."**
>
> **MICHAEL HORNSBY | Director of Customer Success, Salesforce**

2. Make it Easier for Citizens to Apply for Aid

The pandemic has displaced many citizens now seeking financial assistance and benefits, including unemployment, rental and small business loans. To address these growing needs, the federal government has provided $4 trillion of COVID relief funds since the March 2020 onset of the pandemic. Congress also passed a new infrastructure bill that will increase capital across all levels of government. While these additional funds benefit the public, managing the influx strains agencies.

Hornsby shared that Salesforce helped a federal assistance agency streamline its call center traffic that grew from just a few thousand calls a day to tens of thousands..

"We were able to help them go live in just 72 hours with automated call center deflection like chatbots, and optimize their loan origination platform," he said. "In order to quickly scale up to this new demand, we helped manage application intake, digital approval forms, and ultimately integration with the financial payment system and Treasury [Department]."

# 3. Send Email & SMS Updates

To improve outreach to citizens, some agencies have begun sending automated messages to individuals via email or text message to provide timely updates.

This communication method became critical for a federal agency trying to update citizens about changes in COVID policies and welfare services. Salesforce stepped in to implement its automation technology to help the agency inform citizens in real time.

"This example can apply to every single government organization at all levels of government," Radich said.

"You have to look for your largest correspondence backlog where you're receiving the most requests for information or inquiries across the Executive Office of Public Affairs or your communications departments."

Once the agency modernized its correspondence management system, it could better tackle the influx of information requests and comply with the new policies.
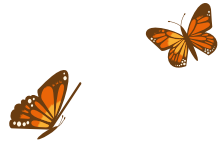
4. Provide Phone Support

Conversely, automation is not a catch-all. Hornsby noted that when seeking information about their specific individual situation, some people prefer to have a conversation rather than send an email or speak to a bot.

He recalled a large federal agency that specializes in logistics and package delivery whose customer relationship management system was suffering

> **The customer experienced benefits of improved adoption, better data quality and collaboration amongst the staff."**
>
> **MICHAEL HORNSBY | Director of Customer Success, Salesforce**

from poor performance, usability issues and costly maintenance that negatively impacted employees' ability to interact with the public.

"This agency implemented Salesforce to track accounts, contacts, opportunities and interactions among the more than 2,000 sales and service users," he said. "The Salesforce software is currently managing the national sales and service teams, as well as supporting business customers and prospects."

The agency also uses Salesforce's cloud platform to enhance service delivery and interactions for its most strategic and high-value customers.

"The customer experienced benefits of improved adoption, better data quality and collaboration amongst the staff," Hornsby said. "Because we executed in just nine months, they benefited immediately. It was really turnkey for them."

5. Keep Citizens Informed During Health Emergencies

In the midst of a public health crisis, relaying vaccine information to citizens is critical. Salesforce has worked closely with agencies to quickly stand up applications and capabilities to ensure communities have quick and safe access to COVID-19 vaccines.

Radich recalled working with a city agency struggling to manage vaccine distribution in addition to regular daily operations.

An agency team started using an integrated application programming interface and low-code approach to meet the demands of the COVID 19 pandemic at scale, and Salesforce enabled this team to set up vaccination sites around the city to create a consistent user experience.

Through these upgrades, the team delivered more than 650,000 vaccinations in under two months, and its application helped citizens create and schedule appointments in under 3 minutes.

"This team embodies the kind of mission-driven people we see across the public sector each and every day," Radich said. "This is why we're so excited to be bringing these use cases to you, so your organizations can follow these examples."

Modernization efforts like these are only going to continue as agencies experience a spike in demand Radich's three key pieces of advice for agencies trying to optimize CX: Make speed a priority, rally around new ways of engaging – use your superpowers of creativity and imagination to solve problems – and don't be paralyzed by legacy.

"Whether you are considering chatbots, contact center modernization, self-service portals, email outreach or digital forms, there is no wrong way to get started," he said. "If you've got big challenges, find the small important wins and then rinse and repeat."

[Learn more](#) about how you can modernize your agency's CX.