



# Citizen Experience Self-Assessment Workbook

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A photograph of four business professionals in a meeting room. A woman in a white shirt is standing and shaking hands with a woman in a light blue shirt who is seated at a table. A man in a white shirt and tie is seated to the left, and another woman in a white shirt is seated in the background. They are all smiling. The room has large windows overlooking a city skyline. The entire image has a light blue color overlay.

# Introduction

## Introducing Citizen-Centric Services:

### What Does This Mean for Regional and Local Governments?



What do we mean by citizen-centric services?

Digital capabilities will empower governments to deliver convenient experiences that join up the end-to-end service journey and can anticipate citizen needs. However, investing in digital and data won't be sufficient. Government executives will have to deliver citizen-centric services by driving cultural change, building fluid organizational structures, nurturing visionary leadership and a mentality of trust and collaboration, and empowering civil servants to deliver empathic services.



What does this mean for national governments?

Central governments need to offer omni-channel experiences. They can do this by joining up the service journey across all touchpoints between government and citizens (and businesses). This should be enabled by secure data exchange across administrations, automating processes across the front-to-back-end continuum, and embracing a vision of a European personal digital wallet that empowers users to authorize personal data sharing, access personalized services, and update personal details and circumstances.



What does this mean for local governments?

Regional and local governments must implement a people-centered vision in their communities. They must streamline public service interactions, collect citizens' feedback about their satisfaction, and encourage them to be active in the community. They must also integrate IT and OT. Together, this can contribute to more convenient, affordable, and healthy lives for residents and visitors.

"Now, more than ever, citizens believe that the public sector should respond to their needs without delay. If they have a question, they want an answer. These high expectations are informed by their interactions with the private sector, where anything they want to know is just a click or a tap away. Everyone is empowered to access the information they need — whenever they need it. Embracing the right technology is key to making this happen."

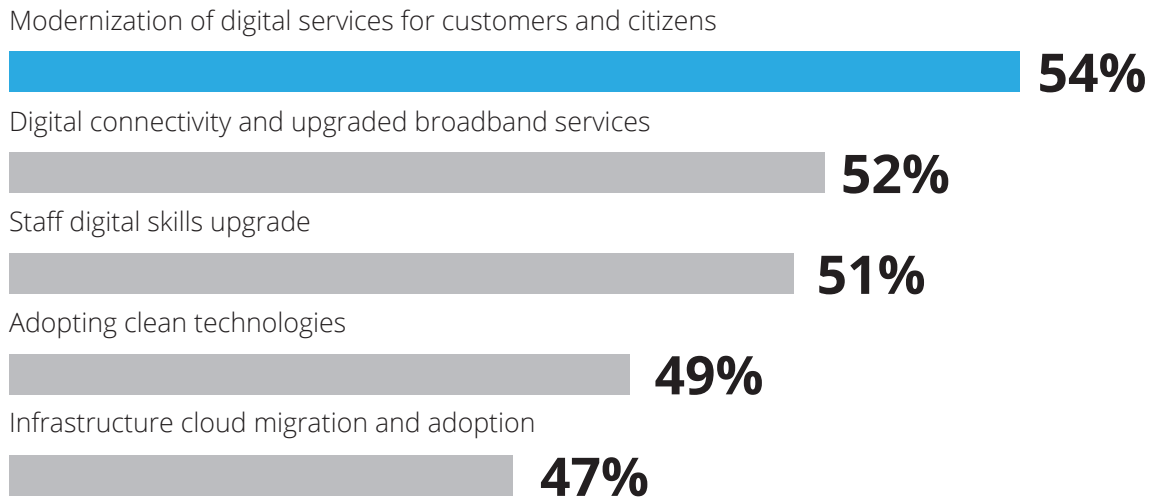
Ana Rita, Government Sector Director for Western Europe, Microsoft

# Introducing Citizen-Centric Services:

## Delivering Citizen-Centric Services Is a Priority for European Government Executives

The Next Generation EU Recovery Plan offers European government leaders a once-in-a-generation opportunity to make societies more inclusive, infrastructure more resilient and efficient, and cities more livable and prosperous. At least 20% of this funding will be channeled toward digital initiatives. Modernizing and improving digital services is a priority for European government executives.

### Top 5 digital initiatives that European government executives plan to fund with national and EU recovery packages



“Our mission is to build a simple, joined-up, and personalized experience of government for everyone. Using our unique position at the center of government, we will develop services that just work for the user, however complex the underlying systems.”

Digital Service Strategy 2021–2024, U.K. Government Digital Service, 2021

“Helsinki wants to become **more customer-oriented** and agile in its operations and to utilize data to create better services and make better decisions.”

City of Helsinki, Digital Transformation Plan, 2018

# Introducing the CX Self-Assessment Workbook

## What?

IDC has created a self-assessment workbook to help you determine your citizen experience (CX) maturity level. The workbook is based on the **IDC CX Experience Framework**, which takes into account the **technical** and **organizational transformation** that government must embrace to become citizen centric. Answer questions in the workbook to determine your stage of CX maturity and then find targeted recommendations to help your organization move forward on its CX journey.

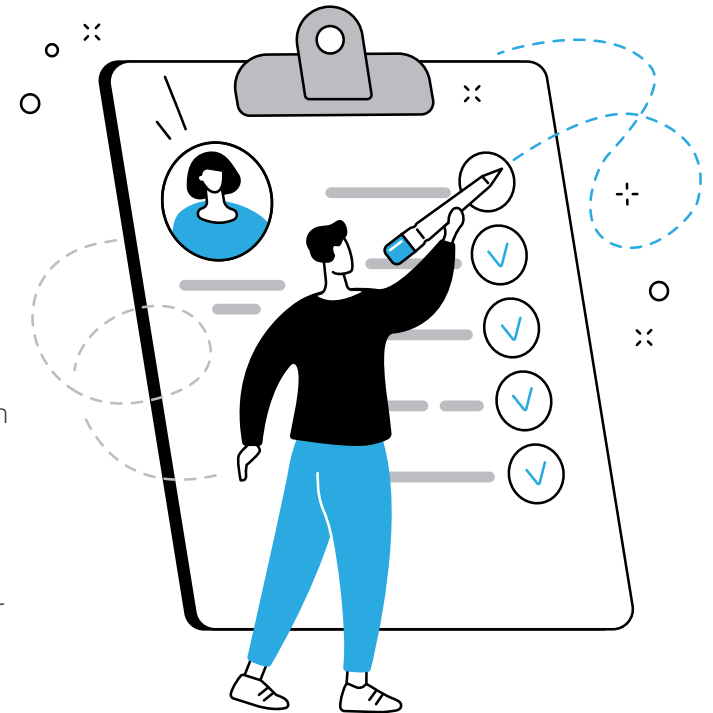
## Who?

This workbook has been developed specifically for central and local government executives and civil servants who are looking to deliver high-quality public services and create a more user-friendly and empathetic approach to engaging their citizens. The workbook is useful for organizations at any stage of CX maturity.

## Why?

The workbook will:

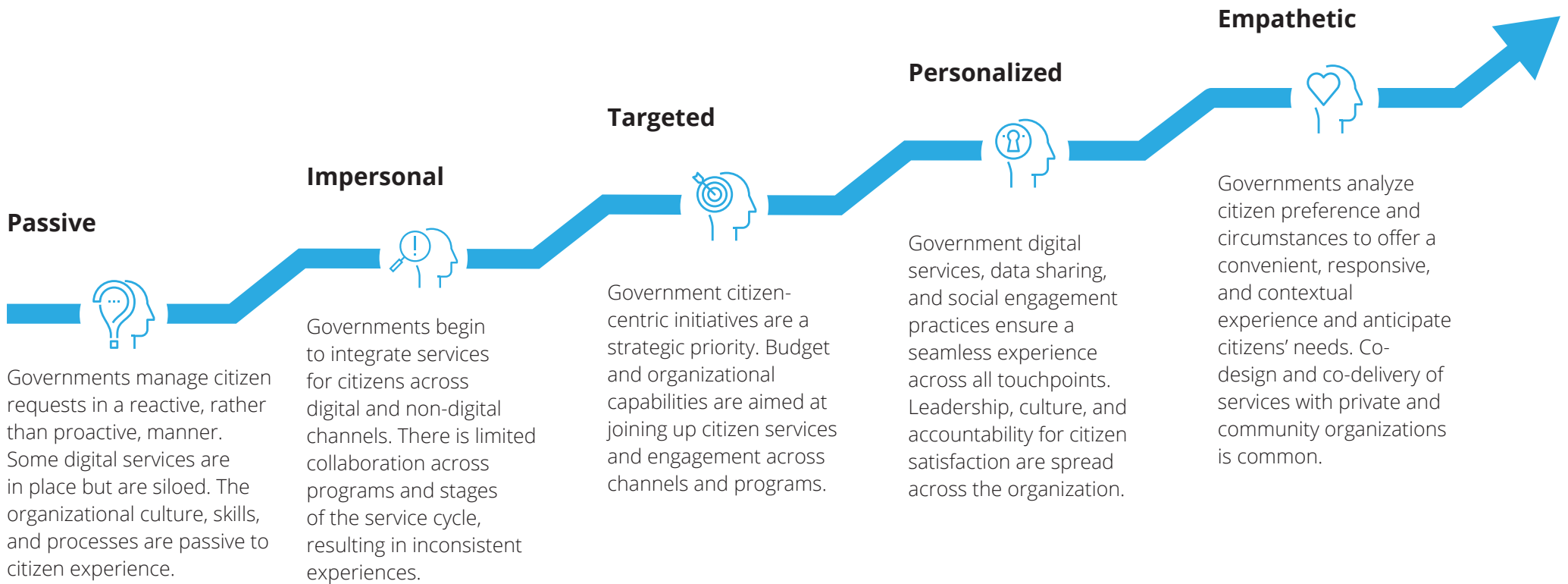
1. Help you to understand the current state of your government institution's maturity in terms of citizen centricity.
2. Provide recommendations for next steps based on global CX best practices. These recommendations can be used as an input for your organization's CX road map.
3. Help you to build a business case and to gain executive and organizational buy-in for CX initiatives.



# Introducing the CX Maturity Framework

## Stages of Citizen Experience Readiness

IDC has built a framework around global best practices for citizen experience and citizen centricity. The framework was developed by combining insights from global expert interviews and a literature review of other models from government, academia, and technology suppliers. The model provides stages, measures, actions, and outcomes required for governments to develop and execute successful CX strategies.



# Introducing the CX Maturity Framework

## The Framework Is Centered Around Four Main CX Dimensions

Government organizations must have strong executive leadership for CX initiatives, a road map, and a designated budget. Underpinning this, there must be a citizen-centric culture with employees incentivized to learn from their mistakes and empowered with skills, training, platforms, and tools to enable delivery of better services.

### ORGANIZATIONAL SELF-AWARENESS

- Citizen-centric leadership and culture
- Employee empowerment
- Road map and budget



### CITIZEN INSIGHTS

- Analytics and insights
- Collaboration
- Citizen experience metrics

Governments must gain a deep understanding of their citizens' preferences, needs, characteristics, and satisfaction levels by collecting and analyzing citizen data. These citizen insights can be leveraged to improve efficiency, responsiveness, convenience, and personalization of service delivery.

### ENGAGEMENT AND COMMUNICATION

- Personalization
- Omni-channel engagement

Governments need to select the most effective ways of engaging and communicating with citizens. This includes providing omni-channel services across multiple platforms on whatever device they prefer. This may also include partnering with third parties to deliver services, for example banks to provide welfare payments. Providing inclusive services is particularly important for government organizations given the sensitivity of many of the issues that fall under their purview.

### CITIZEN CONTEXT AND TRUST

- Social network
- Trust
- Frame of reference

Governments should ensure that services are aligned with the specific circumstances and needs of citizens. This can be determined by life events, personal relationships, and overall socioeconomic context. Context and trust must be brought together to achieve the best balance between respect for data privacy and satisfying citizens' preferences.



# How to Use This Workbook

The goal of the MaturityScape is not the maturity score itself. The goal is to identify areas of strengths and areas for improvement to enable your organization to make objective decisions on resource investments that will allow you to progress along the maturity curve.

By selecting, to the best of your knowledge, the answers that most accurately describe the current status of the government institution that you represent, you will be able to calculate a useful score and identify well-targeted recommendations.

Read the questions for each dimension (A-C) and decide where your organization best fits on the 1 to 5 maturity scale.

On the following slide, navigate to the same dimensions and stages of maturity to find your specific recommendations to enable change and improvement.

<b>A</b> How would you assess CX leadership and culture at your organization?	<b>1</b> There is no clear leadership or culture of CX. CX efforts, if any, are at the grassroots level, resulting in disjointed implementation.	<b>2</b> CX is a recognized leadership and organizational buzzword; nevertheless, budget and implementation remain departmental prerogatives.	<b>3</b> There is leadership and organizational support for CX initiatives, but execution is at the department level, resulting in significant inconsistencies.	<b>4</b> There is a single executive program for CX which is responsible for coordinating and leading CX efforts across the organization, driving a CX culture.	<b>5</b> Leadership at all levels is citizen centric and drives a culture focused on delivering empathetic and personalized citizen experiences.
	<b>1</b> The organization has no CX road map. The focus is still on running the internal processes in compliance with laws and policies.	<b>2</b> The organization recognizes the value of CX in its services and has some isolated initiatives but does not have a consolidated CX road map.	<b>3</b> The organization has a CX road map in place, which focuses on providing citizen-centric services, and a limited CX budget concentrated in a few customer service units.	<b>4</b> The organization has a CX budget and road map which focuses on providing proactive and empathetic citizen services.	<b>5</b> The organization has a CX road map and budget which integrates insights from CX metrics and cross-organizational collaboration.
	<b>1</b> Employees have little to no competencies related to CX and there is no systematic program to grow CX capacity.	<b>2</b> Only citizen-facing employees are trained in basic CX skills. All other employees receive little to no CX training.	<b>3</b> There is alignment of skills, training, and job responsibilities of all employees to CX but efforts are still disjointed.	<b>4</b> Employee skill requirements, roles, and training are well defined, and tools to enable CX are in place across the organization.	<b>5</b> Employees are empowered through their skills, training, roles, and tools to deliver seamless and empathetic experiences.

	Passive 1	Impersonal 2	Targeted 3	Personalized 4	Empathetic 5
<b>A</b> LEADERSHIP AND CULTURE	Kick start a conversation with your organization's executives on the value of prioritizing CX. To fuel this discussion, draw on experiences from other government agencies and tech partners to understand what can be achieved and the critical success factors.	Create a centralized CX working group responsible for monitoring, understanding, and responding to changes in citizen experience and context.	Create a single executive program for CX that is responsible for coordinating and leading CX efforts across the organization and driving a citizen-centric culture. The program should leverage CX metrics to monitor changes to citizen experience and context.	The CX executive program should coordinate with other public and/or private sector partners to drive a more coordinated citizen experience and a citizen-centric culture across the organization.	The CX executive program should maintain partnerships with public and private organizations to drive a coordinated citizen experience. These partners may be able to share data to provide a 360-degree view of the citizen.
<b>B</b> ROAD MAP AND BUDGET	Develop an organizational CX mission statement and assign budget to priority initiatives focused on specific services and/or groups. The statement should be developed in consultation with representatives from all key units, and be disseminated widely internally.	Develop an organization-wide CX road map outlining core objectives and the required policies, processes, and tools. It should have executive involvement, be developed in consultation with representatives from all key units, and be disseminated widely internally.	Create a CX road map and assign budget for priority activities. It should be developed in consultation with internal and external experts. Set up dedicated internal resources or hire external consultants to help the organization apply for EU or national recovery funds.	Maintain an up-to-date CX road map integrating insights from CX metrics and internal and external experts. Sufficient budget should be ring-fenced for its implementation and the organization should apply for EU or national recovery funds to expand resources available for CX.	Manage the road map as a living document with goals updated based on insights from CX metrics, benchmarking, consultation, and advances in enabling technologies. The organization should apply for EU or national recovery funds to expand resources available.
<b>C</b> EMPOWER EMPLOYEES	Establish dedicated employee roles focused on CX starting with functions that may already have experience, such as citizen contact centers. These employees should be trained in basic CX skills such as CX measurement and customer experience mapping.	Each department should establish job responsibilities and provide CX training for citizen-facing and non-citizen-facing employees. Each department/function will be responsible for addressing different aspects of CX transformation.	Include CX competencies, including more sophisticated ones, such as ethnography and digital marketing, as a hiring criteria for employees. Integrate CX training, goals, and metrics as part of employee career paths and performance.	Recognize and reward CX employee excellence and train employees to work with technical tools, such as chatbots and intelligent process automation. Consider partnering with academic institutions with expertise in areas such as user experience to augment, capacity and innovation.	Continue to nurture employees' understanding and support for CX initiatives that reach across the whole citizen journey. Provide employees with the right organizational and advanced technical tools to deliver seamless and empathetic citizen experiences.



**Organizational Self-Awareness**

# Organizational Self-Awareness: Introduction and Framework

In any digital transformation (DX) program, a culture of innovation and employee empowerment are decisive factors for success.

Initiatives to strengthen and maintain citizen-centric services are no different. Governments' public service mission can create a distinct advantage when it comes to developing a citizen-centric culture and mobilizing employees around driving social outcomes, such as providing empathetic public services for citizens. However, research highlights that public sector organizational structures and culture are often deep rooted, slow to change, and risk averse, because of the complex missions they are tasked to deliver.

Creating organizations in which the leadership, structure, and culture are geared toward citizen experience is critical to ensure that citizen experience is embedded throughout the whole organization as a core part of its mission. Government organizations must have strong executive leadership for CX initiatives, a road map in place, a designated budget, and well-defined policies and processes.



## ORGANIZATIONAL SELF-AWARENESS



### Citizen-centric leadership and culture

There should be strong executive leadership driving CX initiatives across the organization. Culture is key: all employees should support CX initiatives and understand that they impact the citizen relationship.



### Employee empowerment

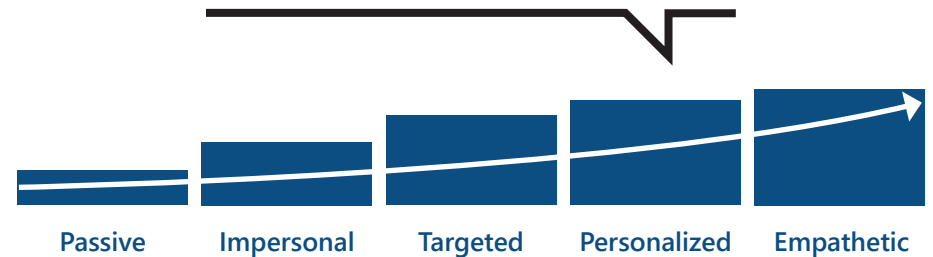
As agents of CX, employees should be empowered through skills, training, job responsibilities, and tools — e.g., collaboration tools, insights and workflow management, and intelligent process automation — to deliver seamless and empathetic experiences.



### Road map and budget

To effectively drive coordinated CX initiatives, the organization should have a CX road map and a ring-fenced budget in place. Best-practice road maps are developed and updated based on CX metrics and cross-departmental collaboration.

Where are you in your organizational self-awareness? Answer some questions on the next slide to find out.



# Organizational Self-Awareness: Questions and Self-Assessment



Note where your organization best sits on the 1 to 5 scale for each of the question areas. On the next page, you will see the recommendations to enable change and improvement.

<p><b>A</b> How would you assess <b>CX leadership and culture</b> at your organization?</p>	<p><b>1</b> There is no clear leadership or culture of CX. CX efforts, if any, are at the grassroots level, resulting in disjointed implementation.</p>	<p><b>2</b> CX is a recognized leadership and organizational buzzword; nevertheless, budget and implementation remain departmental prerogatives.</p>	<p><b>3</b> There is leadership and organizational support for CX initiatives, but execution is at the department level, resulting in significant inconsistencies.</p>	<p><b>4</b> There is a single executive program for CX which is responsible for coordinating and leading CX efforts across the organization, driving a CX culture.</p>	<p><b>5</b> Leadership at all levels is citizen centric and drives a culture focused on delivering empathetic and personalized citizen experiences.</p>
<p><b>B</b> How would you assess the <b>CX road map and budget</b> allocation at your organization?</p>	<p><b>1</b> The organization has no CX road map. The focus is still on running the internal processes in compliance with laws and policies.</p>	<p><b>2</b> The organization recognizes the value of CX in its services and has some isolated initiatives but does not have a consolidated CX road map.</p>	<p><b>3</b> The organization has a CX road map in place, which focuses on providing citizen-centric services, and a limited CX budget concentrated in a few customer service units.</p>	<p><b>4</b> The organization has a CX budget and road map which focuses on providing proactive and empathetic citizen services.</p>	<p><b>5</b> The organization has a CX road map and budget which integrates insights from CX metrics and cross-organizational collaboration.</p>
<p><b>C</b> How would you assess your organization's ability to hire, train, promote, and empower employees with the right tools to deploy CX initiatives?</p>	<p><b>1</b> Employees have little to no competencies related to CX and there is no systematic program to grow CX capacity.</p>	<p><b>2</b> Only citizen-facing employees are trained in basic CX skills. All other employees receive little to no CX training.</p>	<p><b>3</b> There is alignment of skills, training, and job responsibilities of all employees to CX but efforts are still disjointed.</p>	<p><b>4</b> Employee skill requirements, roles, and training are well defined, and tools to enable CX are in place across the organization.</p>	<p><b>5</b> Employees are empowered through their skills, training, roles, and tools to deliver seamless and empathetic experiences.</p>

# Organizational Self-Awareness: Recommendations

The recommendations below correspond to the five stages of CX maturity. These targeted recommendations are designed to help your organization move from its current maturity stage to the next level.



# Organizational Self-Awareness: Best Practice and Resources

## Best Practice Illustration

## Useful Links and Resources

### Good Practice in Organizational Self-Awareness — City of Madrid

**WHAT** — Over the past three years, the City of Madrid has been undergoing a DX process aimed at modernizing and digitizing its workplace and citizen services, from taxes to human resources. This is part of the mayor’s wider plan to promote urban economic recovery. The city’s DX agenda accelerated rapidly during the pandemic driven by a cultural change among city employees and residents whose rate of digital adoption increased significantly out of necessity.

**HOW** — The Digital Office at the City of Madrid introduced a series of collaborative tools to empower employees and strengthen citizen services built on cloud infrastructure to enable the flexibility to scale services as needed. Crucially, the transformation process was accompanied by a strategic push to unify the city’s approach to digital services across the whole administration. The city also rolled out a series of training courses to give employees confidence in using the new tools introduced. Significantly, the city sees employee training as a continuous process rather than a one-off event.

**BENEFITS** — The transformation process was underway before the pandemic, which meant that the administration was well equipped to ensure service continuity for citizens with employees continuing operations while working from home. Looking forward, the city is exploring new ways to strengthen CX including improving the city’s digital identity, bolstering cybersecurity and trust, and increasing coordination and data exchange across local authority organizations.

[+ Read more about the City of Madrid’s CX journey here](#)

### Leadership



- Leading with Intentionality: The 4P Framework for Strategic Leadership
- State Capabilities for Problem-Oriented Governance
- Practices for Effective Local Government Leadership
- Organizational Transformation Begins with the Leader

### Culture



- Focus on People and Culture for Digital Transformation at Scale
- Creating an Innovation Culture
- Changes in Organisational Culture Panel Discussion

### Talent and skills



- UK Government Essential Digital Skills Framework
- Innovation Skills in the Public Sector
- The Work of the Future: Building Better Jobs in an Age of Intelligent Machines

A photograph of two elderly men smiling and embracing at a community event. The man on the left is wearing a dark baseball cap and a plaid jacket, while the man on the right is wearing glasses and a dark jacket. They are both smiling warmly at each other. In the background, other people and a building with a string of pennants are visible. The entire image is overlaid with a semi-transparent red color. The text "Citizen Insights" is centered in white.

**Citizen Insights**

# Citizen Insights: Introduction and Framework

Governments must gain a deep understanding of their citizens' preferences, needs, characteristics, and satisfaction levels.

Collecting and analyzing feedback, CX metrics, changing circumstances, case histories, preferences, and satisfaction levels can generate insights for improving efficiency, responsiveness, convenience, and service personalization. Advanced analytics and AI can provide real-time insights that anticipate citizen needs, particularly around life events, such as birth, marriage, starting school, and unemployment. For exceptional experience delivery, internal and cross-agency collaboration is key. Channel proliferation means citizen data is often scattered across systems and data silos. Back- and front-end services may be disconnected. For CX transformation, governments must exchange data and coordinate services across administrations, without compromising on privacy, so that they can apply the ask-only-once principle.



## CITIZEN INSIGHTS



### Analytics and insights

To gain citizen insights, organizations should collect and analyze citizen data, such as feedback, case histories, and preferences. Advanced organizations are leveraging advanced analytics, such as AI, to anticipate citizen needs.



### Collaboration

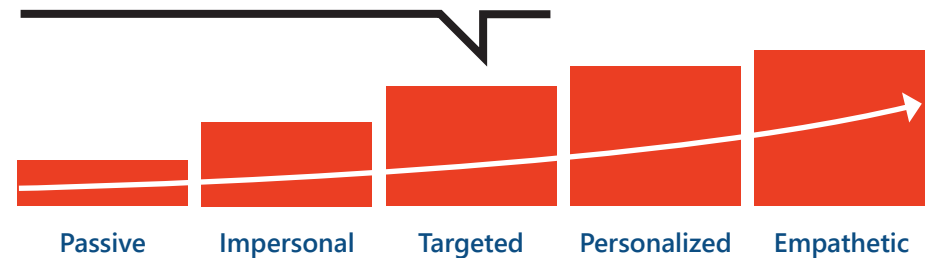
Governments must enable secure data exchange and service coordination between departments and across administrations, such as tax and welfare, or health and social care, by leveraging tools such as master data management.



### CX metrics

Organizations must use qualitative and quantitative CX metrics across touchpoints to meet citizen expectations and needs. Standardized organizational metrics allow comparisons between teams and with other agencies.

Where are you with your citizen insights? Answer some questions on the next slide to find out.





# Citizen Insights: Self-Assessment



Note where your organization best sits on the 1 to 5 scale for each of the question areas. On the next page, you will see the recommendations to enable change and improvement.

<p><b>A</b></p> <p>How would you assess your organization's ability to <b>collaborate</b> with other departments and agencies to bring together a complete view of the citizen and deliver joined-up services?</p>	<p><b>1</b></p> <p><b>Citizen data and CX initiatives are limited to departments or functions,</b> resulting in siloed data that results in limited views of the citizen and services.</p>	<p><b>2</b></p> <p><b>Citizen data is shared within roles, such as citizen support, but isn't shared organizationwide,</b> resulting in a lack of connection beyond immediate roles..</p>	<p><b>3</b></p> <p><b>Cross-agency data interoperability and process integration standards are being developed,</b> but collaboration is still ad hoc.</p>	<p><b>4</b></p> <p><b>There is an organization-wide view of the citizen</b> that enables the ask-once principle. Cross-agency process maps identify priority areas for CX improvement.</p>	<p><b>5</b></p> <p><b>Process collaboration and data sharing are optimized for a 360-degree view of the citizen;</b> this includes public sector, private sector, and citizen personal data.</p>
<p><b>B</b></p> <p>How would you assess your organization's ability to collect, manage, and use <b>citizen insight</b> data in decision making?</p>	<p><b>1</b></p> <p><b>There are isolated applications of analytics and data models</b> at the departmental level to understand the citizen.</p>	<p><b>2</b></p> <p><b>Citizen-facing personnel employ integrated systems for sharing relevant citizen data</b> but there is little collaboration across the organization.</p>	<p><b>3</b></p> <p><b>Citizen insights from integrated front-to-back-end systems of citizen information are accessible</b> based on role and processes.</p>	<p><b>4</b></p> <p><b>There is cross-program and cross-agency collaboration</b> about citizens for service feedback, change of circumstances, and preferences.</p>	<p><b>5</b></p> <p><b>There is a 360-degree view of citizen preferences, circumstances, and satisfaction.</b> Advanced analytics, including AI, are used to anticipate citizen needs.</p>
<p><b>C</b></p> <p>How would you assess your organization's ability to use <b>appropriate metrics</b> to measure the success of your CX initiatives?</p>	<p><b>1</b></p> <p><b>There is no organization-wide use of analytics or use of a single or limited set of quantitative CX performance measures.</b></p>	<p><b>2</b></p> <p><b>There are a limited set of quantitative CX measures,</b> primarily citizen satisfaction scores. Metrics are often limited to a function (e.g., contact center) or department.</p>	<p><b>3</b></p> <p><b>There is a standard, organization-wide set of quantitative performance measures and dashboards</b> incorporating limited qualitative indicators over time.</p>	<p><b>4</b></p> <p><b>The organization combines comprehensive qualitative and quantitative CX data and measures with predictive analytics.</b></p>	<p><b>5</b></p> <p><b>Advanced analytics and AI are applied across contextual quantitative and qualitative CX KPIs</b> to ensure alignment between efficiency and citizen empathy.</p>

# Citizen Insights: Recommendations

The recommendations below correspond to the five stages of CX maturity. These targeted recommendations are designed to help your organization move from its current maturity stage to the next level.



# Citizen Insights: Best Practice and Resources

## Best Practice Illustration

### Good Practice in Citizen Insights — Colchester Borough Council

**WHAT** — Colchester Borough Council, in the U.K., provides a wide range of services to its 192,500 residents, from waste collection to planning and licensing. The borough has taken steps to modernize its citizen services to improve customer journeys and provide citizens with personalized and joined-up services. This objective had to be balanced with a growing population and pressure to reduce service administration and processing costs.

**HOW** — The council decided to develop an online self-service offering for citizens across a range of services from planning applications to taxi licenses. The council also unified its data across its applications to help give its employees a fuller view of citizens and their needs, including, citizens, case history, and their active requests across different services. Data-driven insights have also been used to improve service delivery; for example, data analysis from the recycling tracking system is used to highlight problem spots and where residents need encouragement to recycle.

**BENEFITS** — Developing intuitive self-services for citizens resulted in channel shift — with mobile device use increasing 8%. With less funding spent on administering and processing services, more resources are now available to help vulnerable citizens who need face-to-face support. Further, the insights gained from unifying data across services has helped the council to provide more joined-up, efficient, and empathetic services.

[+ Read more about Colchester Borough Council's CX journey here](#)

## Useful Links and Resources

### Data sharing — 360-degree citizen view



- NHS Data Sharing Agreement Template
- Australia Data Commissioner Data Sharing Agreement
- Worldbank Social Registry Data Exchange

### Data management and analytics



- U.S. Government Data Governance Playbooks
- U.K. Office of National Statistics Data Principles
- Using AI and Machine Learning to Reduce Government Fraud

### CX metrics



- Customer Experience: Are We Measuring the Right Things?
- Explaining Citizen Satisfaction and Dissatisfaction with Public Services
- Citizen Satisfaction With Federal Government Services

A woman with long brown hair, wearing a black headset with a microphone, is shown in profile, looking towards the left. She has a slight smile. The background is a blurred office or call center environment with another person visible. The entire image has a warm, golden-brown color cast.

**Citizen Engagement  
and Communication**

# Citizen Engagement and Communication: Introduction and Framework

Governments need to select the most effective and inclusive ways of engaging and communicating with citizens.

This includes providing omni-channel services, which means meeting citizens' needs across multiple platforms on whatever device and through whichever channel they prefer. Governments have an obligation to ensure that services are available to all citizens, including citizens with disabilities and those who cannot access digital channels: some citizens may prefer to speak to an advisor over the phone, while others prefer self-service technologies such as online chatbots.

Government organizations must also balance citizens' desire for service personalization with their endorsement of their data being shared and leveraged for this purpose — this requires building trust. Research indicates that citizens' overall trust in an agency is strengthened based on the quality and efficiency of the services provided. Delivering trusted, personalized, and easily accessible services is particularly important for government organizations given the sensitivity of many of the issues that fall under their purview; from health emergencies to housing problems, citizens can feel hesitant to share information over certain channels.



## Omni-channel engagement

Governments must expand the channels available to citizens to provide more choice and easier access. This requires an increased level of back- and front-end coordination to ensure a user-friendly experience. Organizations should explore partnering with third parties to expand engagement channels and convenience (such as banks).

## ENGAGEMENT AND COMMUNICATION

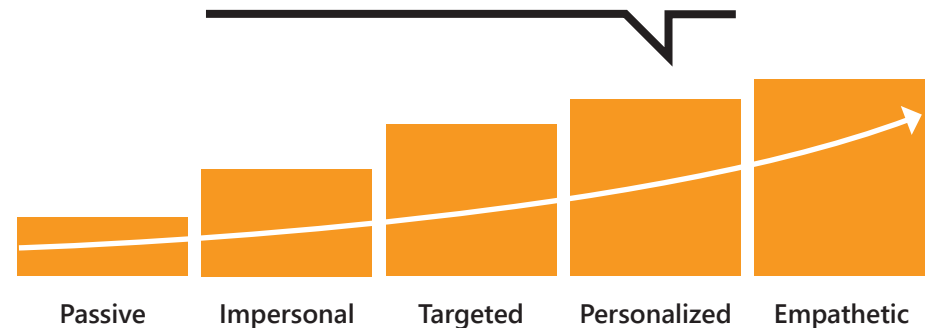


## Personalization

Governments must take steps to personalize services through consolidating and applying citizen data across channels. This can include data on demographics, age, life events, services enrolled, tax history, income, survey responses, and interaction.





**Where are you with your citizen engagement and communications?  
Answer some questions on the next slide to find out**



# Citizen Engagement and Communication: Self-Assessment

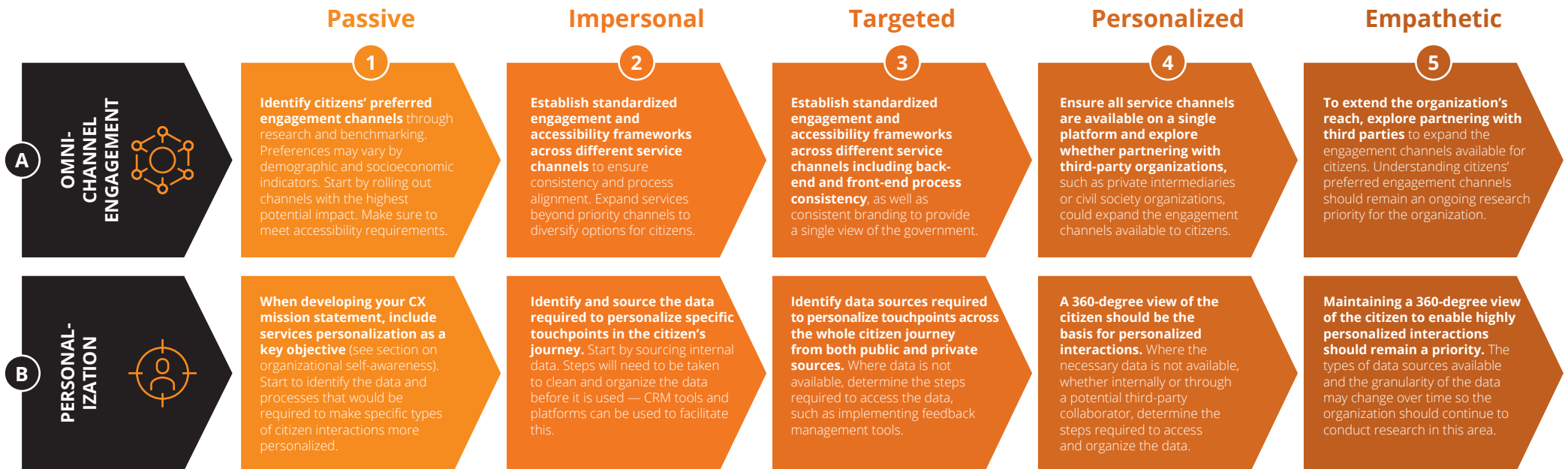


Note where your organization best sits on the 1 to 5 scale for each of the question areas. On the next page, you will see the recommendations to enable change and improvement.

<p><b>A</b> How would you assess your organization's understanding and delivery of citizens' preferred <b>channels of engagement</b>?</p> 	<p><b>1</b> <b>There are limited channels for citizen engagement.</b> There is little understanding of citizens' desired engagement channels and no consistency across channels, departments, or functions.</p>	<p><b>2</b> <b>There are multiple channels for citizen engagement</b> based on a general understanding of citizen preference but with disconnects between back-end systems resulting in inconsistency.</p>	<p><b>3</b> <b>There is coordinated citizen engagement across channels</b> with standardized engagement and accessibility frameworks in place but there are limited information exchanges across programs.</p>	<p><b>4</b> <b>Front-end channels are integrated across programs and agencies to offer personalized service delivery and engagement.</b> Most programs have joined-up front- and back-office systems.</p>	<p><b>5</b> <b>Omni-channel platforms allow citizens to choose among government one-stop shops and private intermediaries</b> resulting in a seamless experience across channels with joined-up front- and back-office systems.</p>
<p><b>B</b> How would you assess your organization's effort to <b>personalize its interactions</b> with citizens?</p> 	<p><b>1</b> <b>There is little understanding of personalization and little to no supporting data</b> to enable personalization initiatives.</p>	<p><b>2</b> <b>There is an understanding of the value of personalization but limited ability to implement</b> due to a lack of necessary data and processes.</p>	<p><b>3</b> <b>Some specific types of citizen interactions are personalized</b> based on the analysis of citizen data, and processes are modified to facilitate additional personalization.</p>	<p><b>4</b> <b>Most citizen interactions are personalized based on data and restructured processes,</b> and where the necessary data isn't available, efforts are made to gather it.</p>	<p><b>5</b> <b>A 360-degree citizen view is the basis for highly personalized interactions</b> and enables the organization to anticipate citizen needs.</p>

# Citizen Engagement and Communication: Recommendations

The recommendations below correspond to the five stages of CX maturity. These targeted recommendations are designed to help your organization move from its current maturity stage to the next level.



# Citizen Engagement and Communication: Best Practice and Resources

## Best Practice Illustration

### Good Practice in Citizen Engagement and Communication — The Municipality of Milan

**WHAT** — In 2016 the city launched a DX project to improve the quality of life and sustainability in the city. At the center of the ongoing project is a citizen-centered vision: “from smart city to smart citizen.” One of the main components is focused on strengthening citizen services from social services to education and mobility, with a particular emphasis on improving citizen engagement.

**HOW** — The municipality is transitioning its services from across its 20 directorates onto a single platform to provide a single view of the government for citizens and a holistic view of the citizen for government employees. To improve citizen engagement, the city implemented a new citizen relationship management (CRM) platform linked to omni-channel services including a citizen telephone line, citizen app, and webpage. The city is also exploring integrating chatbots. In addition, accelerated by the pandemic, citizens can now book online appointments for all offices; this was previously only offered for electronic security cards.

**BENEFITS** — The provision of omni-channel services has made it easier for citizens to communicate with the municipality and has improved the efficiency of service administration. In 2020, the digital certificates issued by the municipality made up to 85% of all certificates with more than 3 million digital payment transactions. In addition, the unified system enables the health and welfare of the whole city to be monitored through dashboards linked to data from the CRM platform. Looking forward, the municipality is planning to integrate additional data into the platform from social networks to enable greater service personalization.

## Useful Links and Resources

### Engagement



- Implementing Citizen-Centric Approach to Delivering Government Services
- Citizen Engagement Governance
- Principles on Citizen Engagement

### Personalization



- A Framework for Delivering Personalized eGovernment Services from a Citizen-Centric Approach
- Exploring Personalization of Public Services
- Anticipatory Governance for Newcomers: Lessons Learned from the U.K., the Netherlands, Finland, and Korea

### Trust



- Building Citizen Trust Through eGovernment
- eIDAS
- Zero Trust Architecture

[+](#) Read more about the Municipality of Milan’s CX journey [here](#)





**Citizen Context and Trust**

# Citizen Context and Trust: Introduction and Framework

Citizen context and trust is about the degree to which your organization is aligned to the specific circumstances of the citizens (and businesses) that are your customers. This is determined by their needs, personal relationships, and the overall socioeconomic context that they are part of. Context and trust must be brought together to achieve the best balance between respect for data privacy and satisfying citizens' preferences in terms of rapid resolution, personalization, and ease of use and engagement. It therefore depends heavily on the effectiveness of your citizen insights programs and the convenience of the channels you use to engage and communicate. It will also require staff to be thoroughly versed both in the core techniques of engaging with citizens and in their ability to immerse themselves in the personal context of the citizens. In this respect, citizen context and trust is what might be termed a **“meta-attribute”** of citizen experience. In many ways it is how staff will use available systems and insights rather than the systems themselves.

Trust also depends on factors outside your control. Even when they have little to do with your organization and the services you deliver, the political atmosphere, government response to crises, and citizen experience with other agencies can all impact the degree to which citizens trust your organization to effectively deliver services. This makes it all the more important to understand social networks — that is, where and how your citizens access trusted information.



## CITIZEN CONTEXT AND TRUST



### Frame of reference

Data should be used to tease out core attributes of the citizen base and the potential impact on communication style and channels, services development, and citizen receptiveness to avoid a “one size fits all” approach to service delivery. It should also provide essential parameters for staff training programs around customer engagement and client diversity.



### Social network

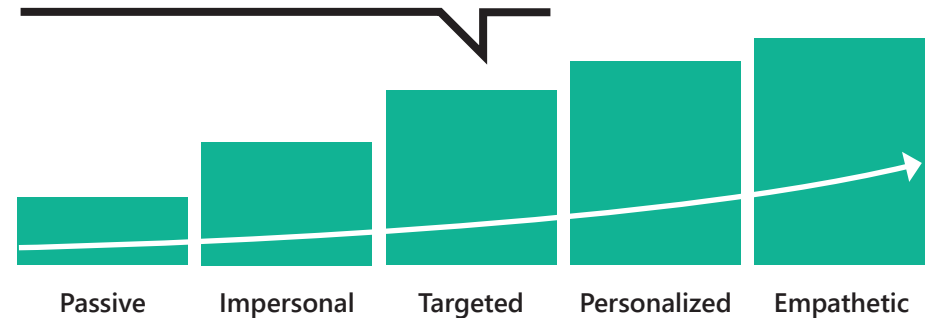
Organizations must have a clear understanding of where citizens and businesses access trusted information including through digital networks (e.g., social media, chatrooms, review sites) as well as physical channels, (e.g., friends and family, citizen bodies, NGOs, industry associations). This information can be leveraged to better understand barriers and opportunities for engaging citizens.



### Trust

Governments must provide clear privacy and security policies for citizen data. This should go beyond compliance with laws and policies, and build trust and citizen agency by enabling citizens to view how their data is being used and manage access through a digital account.

Where are you with your citizen context and trust? Answer some questions on the next slide to find out.



# Citizen Context and Trust: Self-Assessment



Note where your organization best sits on the 1 to 5 scale for each of the question areas. On the next page, you will see the recommendations to enable change and improvement.

<p><b>A</b> How would you assess your organization's understanding of the citizen's <b>frame of reference</b>?</p>	<p><b>1</b> There is little to no understanding of citizens' context (social, cultural, demographic, life stage, and events) and what their needs and preferences are.</p>	<p><b>2</b> There is some understanding of citizens' context, what their needs are, and how this shapes their understanding and preferences for public service.</p>	<p><b>3</b> The organization has an indirect understanding of citizens' frame of reference and has some ability to shape services to align with citizens' needs and preferences.</p>	<p><b>4</b> The organization has a direct understanding of citizens' frames of reference. It occasionally engages citizens to participate in shaping the organization's services.</p>	<p><b>5</b> The organization has a deep understanding of citizens' frames of reference. It designs/redesigns services around the citizen context. It actively engages citizens in shaping public services.</p>
<p><b>B</b> How would you assess your organization's ability to map and understand the citizen's social network?</p>	<p><b>1</b> There is little to no understanding of citizens' physical and digital social and professional networks.</p>	<p><b>2</b> There is some understanding of citizens' social and professional networks and generalized sources of influence by demographic.</p>	<p><b>3</b> There is a moderate understanding of the citizens' physical and digital social networks and sources of influence by demographic and socioeconomic indicators.</p>	<p><b>4</b> There is a detailed understanding and mapping of citizens' social and professional networks and sources of influence, and this is used to shape citizen service design and implementation.</p>	<p><b>5</b> There is deep understanding and mapping of both citizens' physical and digital networks; this knowledge is used to shape strategy, communication channels, brand identity, and marketing.</p>
<p><b>C</b> How would you assess your organization's effort to build trusted interactions with citizens?</p>	<p><b>1</b> Citizen data, privacy, and security policies are ambiguous and lack transparency on how data is collected, shared, or used. The organization does not measure citizen trust.</p>	<p><b>2</b> The organization only has basic citizen privacy and security policies and doesn't measure citizen trust.</p>	<p><b>3</b> Standardized citizen data, security, and privacy policies and citizen trust KPIs are established across agencies and departments. Efforts are focused mainly on regulatory compliance.</p>	<p><b>4</b> The organization goes beyond regulatory compliance and allows basic modification of citizen data collection and use to enable greater transparency. Citizen trust KPIs are established and reviewed regularly.</p>	<p><b>5</b> Citizens are given a digital account built on zero-trust architecture. They can authorize data sharing, pre-fill forms, update personal details, access personalized services, and check the status of procedures.</p>

# Citizen Context and Trust: Recommendations

The recommendations below correspond to the five stages of CX maturity. These targeted recommendations are designed to help your organization move from its current maturity stage to the next level.



# Citizen Context and Trust: Best Practice and Resources

## Best Practice Illustration

## Useful Links and Resources

### Good Practice in Citizen Context and Trust — Cascais

**WHAT** — The municipality of Cascais, in Portugal, has become a hotbed for innovative smart city solutions. These include MobiCascais (a multimodal mobility app), participatory budgeting, smart waste collection, and CityPoints (a citizen engagement platform), all of which feed into an operational control center that connects data from across the territory. The city's vision is to use technological innovation to improve quality of life, convenience, and efficiency of service.

**HOW** — The CityPoints App was established to help connect citizens and tourists to the city's services, events, and initiatives through their smartphones. The app is a gamified platform that enables citizens to redeem rewards from the city and local sponsors for conducting civic actions such as providing feedback on city services, recycling, and supporting local libraries. To develop the app, and other CX projects, the city leadership set up an innovative and multidisciplinary team to look at community needs in a holistic way, take a long-term view, and engage the private sector and other ecosystem partners.

**BENEFITS** — The app provides an easy and fun way for citizens to engage with the municipality and vice versa. The city is also using real-time data from the app to gain CX insights from CityPoints and other municipal services. In recognition of this innovative approach, the CityPoints app won the World Summit Award for the best mobile app for government and citizen engagement.

### Frame of reference/context



- Investigating Context Factors in Citizen Participation Strategies: A Comparative Analysis of Swedish and Belgian Smart Cities
- A Framework for Customer-Oriented Lean Innovation
- On the Role of Empathy in Customer-Employee Interactions

### Social media



- Unpacking the Black Box: How to Promote Citizen Engagement Through Government Social Media During the COVID-19 Crisis
- Citizens' Engagement on Local Governments' Facebook Sites. An Empirical Analysis: The Impact of Different Media and Content Types in Western Europe
- The Application of the Sentiment Analysis Technique in Social Media as a Tool for Social Management Practices at the Governmental Level

[+](#) Read more about the Municipality of Cascais' CX journey [here](#)

A close-up photograph of a hand holding a silver pen and writing on a white sticky note. The hand is wearing a light-colored, textured sleeve. The background is blurred, showing other sticky notes on a surface. The entire image has a blue tint. Overlaid on the center of the image is the text "Score Your Maturity and Affirm Your Strategy" in a white, bold, sans-serif font.

**Score Your Maturity and  
Affirm Your Strategy**

# Self-Assess Your Maturity to Inform Your Strategy and Tactics

Use this grid to keep track of your overall citizen experience maturity. Print the slide or use Acrobat Reader or another PDF reader that allows comments/notes. Enter the number from each of your answers as indicated. For your overall number, add up all 11 individual numbers then divide by 11.

## Organizational self-awareness

- Leadership and culture at your organization
- Road map and budget allocation at your organization
- Employee empowerment to deploy CX initiatives

Answer number


Total

/ 3 =

Divide by 3

Score

Total

/ 11 =

Divide by 11

Score

## Citizen Insights

- Collaboration with other departments and agencies
- Citizen insight data for decision making
- Metrics to measure the success of CX


Total

/ 3 =

Divide by 3

Score

## Citizen engagement and communication

- Channels of engagement for citizens
- Personalized interactions with citizens


Total

/ 2 =

Divide by 3

Score

## Citizen context and trust: self-assessment

- Understanding citizen frame of reference
- Understanding citizen social networks
- Trusted interactions with citizens


Total

/ 3 =

Divide by 3

Score

### Match your scores to determine category maturity and your overall maturity for citizen experience

- 1 to 1.8 Your Citizen experience stage: **passive**
- 1.9 to 2.6 Your Citizen experience stage: **impersonal**
- 2.7 to 3.4 Your Citizen experience stage: **targeted**
- 3.5 to 4.2 Your Citizen experience stage: **personalized**
- 4.2 to 5.0 Your Citizen experience stage: **empathetic**

Maturity levels defined on page 7



**Building a CX Business  
Case and Road Map**



# Building a Business Case for Citizen Experience Transformation

## Recommendations

1. Utilize the maturity model and recommendations in this workbook to assess your organization's progress and use the recommendations to build a road map and rationale for CX transformation.
2. Design and apply benefits realization templates and processes that monitor and communicate both quantitative, such as cost savings and reduction of fraud, and qualitative public value metrics, such as social inclusion, citizen satisfaction, and environmental sustainability.
3. To ensure consistency with regional and/or national priorities, align your proposal with the EU Digital Compass or comparable national strategic documents.
4. Ensure that the CX business case includes sufficient budget for both the technical and organizational investments required.
5. Design citizen-centric services with openness/interoperability in mind and highlight this in the proposal. The potential to link, duplicate, or scale the service with other national government departments or local governments will catch the eye of those that have to approve the business case.

## Useful Links and Resources

### Guidance for building a business case



- OECD: A Business Case Playbook
- UK HM Treasury: Guide to Developing the Project Business Case — Better Business Cases for Better Outcomes
- Victoria State Government Investment Management Standard
- Government of Canada: Business Case Guide
- Government of Australia: ICT Business Case Guide

### Applying for funding



- European Commission: The Facility and Next-Generation EU: National Recovery and Resilience Plans
- Overview of EU Funding Programs 2021–2027
- Energy Cities: How to Access EU and Member State Recovery Funds
- U.K. Research and Innovation: Guidance for Applying to Specific Funds (Innovation Loans, Knowledge Transfer Partnerships, Smart Grants, Horizon 2020)
- Invest Northern Ireland: Horizon Europe: Who, How, What

# Sources of Funding

## Recommendations

1. Explore opportunities to access EU and/or national COVID recovery funds. Most of these funds are scheduled to be committed quickly, so your organization will need to move fast to access funds. Work with suppliers and other partners to understand how funding can be spent and on what technologies.
2. If your organization has sufficient capacity, mobilize a team dedicated to applying for national and/or EU Recovery Funds. Many universities and academic institutions have experience and knowledge of funding application processes and requirements; your organization could also explore partnering with these institutions to apply for and deliver a CX project.
3. Identify any guidelines or templates provided by the national government for building and presenting the business case for a digital investment — this will help to initiate the conversation and make a stronger business case.
4. Conduct research into whether national bodies or the EU mandate the use of specific interoperability standards. This may bolster your funding application but will also enable greater interoperability and open avenues for collaboration or integration with other departments, cities, and communities.
5. If your organization is part of an EU member state, explore whether additional sources of funding may be available such as the European Regional Development Fund (ERDF), European Social Fund Plus, and Horizon 2020. The ERDF and ESF+ have previously been underspent in many EU countries and represent a significant opportunity.

Through the **EU Recovery and Resilience Facility**, around **€67.6 billion in grants** and **€77.16 billion in loans** will be available for digital investments. One of the flagship areas for investment is **Modernise: Digitalisation of Public Administration**. These funds will be channeled through member states' national recovery plans.

Source: European Commission, Recovery and Resilience Facility

Commitments will be frontloaded across all NGEU funding: **78%** of total grants and **100%** of loans are scheduled to be agreed in 2020-2022.

Source: Bruegel 2020 analysis based on the Commission's Sectoral Regulation Proposal

# Building a Road Map

## 1

- Start by ensuring your organization has a clear **CX mission and vision**
- This should be the basis for developing a more detailed road map.
- Most organizations will have initiatives underway. Their value should be assessed and those that are taken forward should be grouped against outcomes to ensure strategic convergence.



## 2

- **Consolidate the guidance** for each dimension of this CX maturity assessment and use these as the building blocks for your roadmap.
- The maturity model provides a holistic approach to ensure that organizational reform and capacity is prioritized alongside technical solutions.



## 3

- **Prioritize quick wins and urgent actions.** This will help you to demonstrate business value and provide a proof of concept for additional investments.
- Then start breaking down larger, more complex initiatives into manageable units.



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