Government 2022
Top Trends in Experience Management

Leveraging citizen data to help governments deliver deeper human experiences.

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SECTION 01

How the Human Experience Informs the Citizen Experience

Advances in modern technology have significantly reshaped the world around us. From what we consume to how, when and where we consume it, the human experience is rapidly altered by technological modernization.

In addition to growing accustomed to years of increasingly personalized services from local businesses and national chains, people in 2020 saw how rapidly the private sector evolved in the face of lockdowns and a less mobile public. Private sector experiences like online shopping, curb-side pick-up, and food delivery greatly influenced public perceptions of what governments should be capable of doing. For government, meeting the rising expectations has become everything.

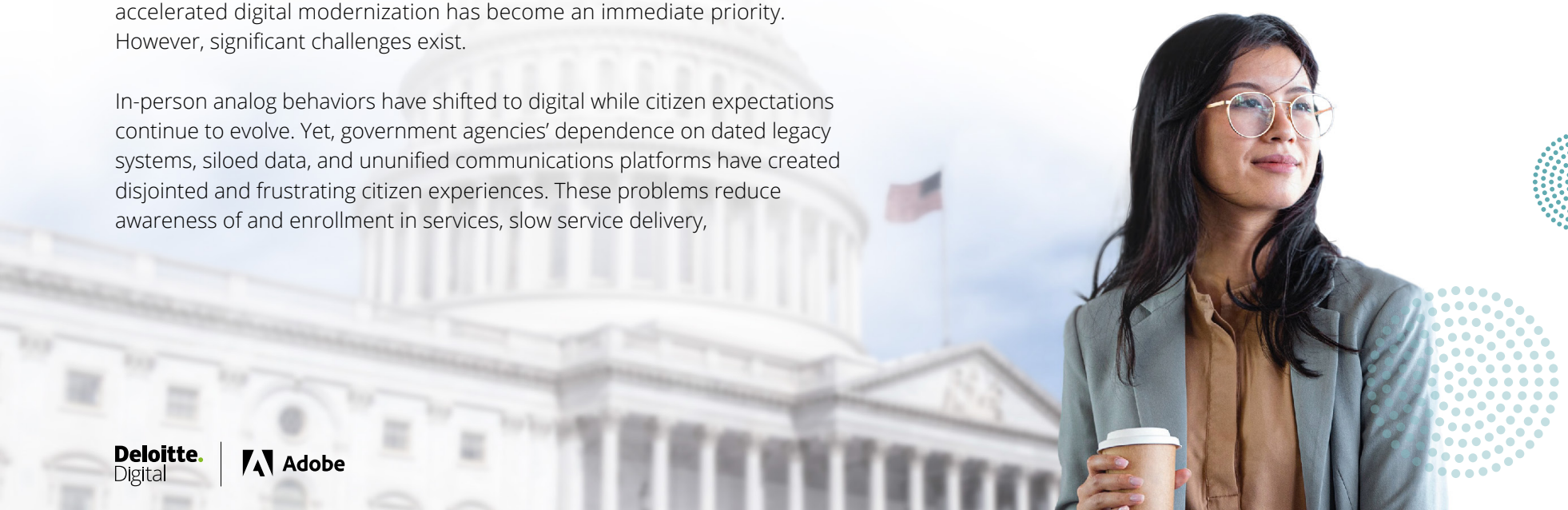
The United States passed the 21st Century Integrated Digital Experience Act (IDEA) in 2019, which aimed to transform government websites, processes, and other digital properties so that the citizen experience is a foremost consideration of agencies' digital properties. IDEA would set forth major digital transformation activities across government, including the requirement that all existing public websites conform with the act's design tenets by June 2019 and provide digital formats for any paper-based forms related to serving the public by December 2020.

Organizations found themselves up against aggressive implementation deadlines and the challenge of assessing, planning, and implementing digital strategies that prioritized features, redesigns, retirements, and rollouts in a way that balanced the needs and wants of citizens with the risks and realities of an agency's transformation readiness.

It is no secret that government agencies all over the world have been long caught in the outer ripples of technological advancement. Government is a late adopter of new technology and workforce trends. However, the COVID-19 pandemic thrust every government agency into the main wave as the demand increased for services to be both accessible and delivered online. For government agencies that often lag behind private sector businesses, accelerated digital modernization has become an immediate priority. However, significant challenges exist.

In-person analog behaviors have shifted to digital while citizen expectations continue to evolve. Yet, government agencies' dependence on dated legacy systems, siloed data, and ununified communications platforms have created disjointed and frustrating citizen experiences. These problems reduce awareness of and enrollment in services, slow service delivery, lower government workforce morale and productivity, and in the long run, cost government and taxpayers more money. This is the unfortunate reality that inhibits progress for today's government and public sector agencies.

The powerful, disruptive impact of the global pandemic forced everyone in 2020 to question how we live, work, communicate and ensure a better life for ourselves and those around us. Our lives changed, as did our perceptions of what matters. Now, as we sort through the data and perceptions of the past year, it is time to start answering those questions. Policymakers and decision-makers in government need to carefully analyze these trends and use the information on public experiences with their government to plan a better path forward.



SECTION 02

Key trends in experience management for government to consider

In a survey conducted by Deloitte Insights, 80% of Australians access public health updates from non-government sources, citing long hold times and confusion about where to find information as key recurring frustrations interacting with the government.*

As the private sector continues to launch disruptive technologies, transform operating models and adjust to changing digital-first ecosystems, citizens expect public agencies to also deliver a personalized, human experience that recognizes people as individuals, values their time, and uses what we know about them in a safe, secure way to bring utility and add value to their lives. Organizations that go beyond delivering on the citizen experience to elevating the human experience will be better positioned to create more meaningful connections and ultimately, build trust between citizens and government.

Given that the majority of citizens prefer to access government information via digital channels, the only way this happens is through smart use of technology and data to help automate, assemble and activate the right experience and messaging for the citizen.**

While some agencies are meeting the challenge of increased demand for digital access, there is plenty of room to improve the citizen experience.

80%

The percentage of government organizations are still at the initial or developing digital maturity stages.***

33%

The percentage of government organizations are feeling increasing urgency to digitally transform.***

The consequences of failure and continued inability to better leverage technology and data to deliver a more human digital experience are significant. To remain relevant against an onslaught of evolving citizen attitudes and disruption coming from private sector competitors, public agencies must change the way they build, organize and operate the citizen experience and must address the technical, data and organizational challenges that stand in the way.

*Source: Deloitte/Adobe, A blueprint for enhanced citizen experiences: The case for simple, smart and personalised government services, 2021
**Source: Deloitte Access Economics and Dynata, Citizen survey, 2020
***Source: https://www.gartner.com/en/industries/government-public-sector

TREND 01: EXPERIENCE MANAGEMENT

Streamline the Digital Citizen Experience

For decades, many governments have based their digital transformations around the idea of "no-wrong-door," striving to create a single one-stop-shop for all digital government services. While admirable, this goal is often unrealistic given the sheer volume of services available. Since governments will always need multiple websites and call centers for citizens to make contact, public agencies require a new philosophy for streamlining their digital experiences.

Introducing: the next-best-door approach – Adobe and Deloitte Digital's alternative to no-wrong-door. Using web analytics in the Adobe Experience Cloud, agencies can make personalized recommendations to citizens based on their audience segment, offering them the next-best government service from whatever "door" they walked through. For example, let's say a citizen goes online to renew a driver's license. Through data analysis, we are able to gain additional audience segmentation information – she is a woman, who is recently pregnant, and falls within the low-income tax bracket. Based on that information, the licensing site displays a personalized recommendation for free prenatal care programs offered by the State's health department. This is just one instance of how the next-best-door approach can anticipate citizen needs to deliver the right service at the right time. Rather than trying to create one website for all government services, each government site can dedicate a section of their homepage to these types of recommendations. This creates a more unified experience for the citizen without requiring heavy development and training to implement.

The private sector has achieved significant growth using this technology to make personalized product recommendations. Next-best-door simply applies the same formula to recommend public services, giving citizens what they need, when they need it.*

*Source: Adobe, Creating a unified, cross-department citizen experience, 2019
**Source: Deloitte, Government Trends 2021, 2021

INSIGHT TO OPPORTUNITY

- Government and public sector agencies need to enable digital transformations that enhance service delivery processes and workflows through automation.
- Focus on using data to identify citizen needs and tailor government processes around them to deliver consistent, anticipatory experiences.
- Agility and speed to digitize is critical. This requires the right digital transformation tools and infrastructure backed by agile engagement platforms, a command of operational and citizen data and scalable organizational structures. This would allow government and public sector agencies to pivot quickly to meet citizens' rising expectations.

80%

of US public sector executives believe providing a unified customer experience has had a significant impact on their organization, and 67% of respondents report that digitized service delivery is a high priority for their organization in response to COVID-19.**

TREND 02: EXPERIENCE MANAGEMENT

Unlock and Create Value from Citizen Data

Government and public sector agencies are challenged by siloed data systems and a lack of common standards that hinder visibility and control. To address these challenges, many agencies are consolidating tool sets, establishing formal data strategy and governance policies, and coming to appreciate data for what it is: an underleveraged asset. Government and public sector agencies need to make data management and sharing across organizations a core competency—where data is securely maintained and shared across relevant, related agencies. This gives organizations rapid and efficient access to real-time, relevant citizen data that informs quick decision making by people and algorithms.

Some agencies have already made significant strides in this area through specialized data exchange portals. For instance, Canada launched a digital exchange platform to enable data authentication between government departments and implement a "tell us once" policy for citizen data.* Other governments are setting up similar data sharing platforms with approved private sector agencies. Singapore developed a platform that allows citizens to fill out only one form for a variety of secure online transactions like opening a bank account or applying for a home, reusing data between public agencies and vetted businesses.* Similarly, many countries including Ireland, Portugal, and the Netherlands use application programming interfaces (APIs) to enable secure data exchange.* No matter the approach, efforts to streamline data sets and improve cross-industry collaboration are proven to reduce administrative burden and improve cost efficiency for public agencies.*

*Source: Deloitte, Government Trends 2021, 2021

INSIGHT TO OPPORTUNITY

- Governments can use specialized data portals and APIs to encourage secure data exchanges with other agencies – both public and private. This technology is proven to streamline administrative processes and increase transparency while improving the citizen experience.
- Secure, ethical data sharing is already being used to benefit a wide variety of public services – from healthcare to pandemic response systems and even natural disaster mitigation.

In the last two years we've seen

9x

more data created than in the entire history of humanity.*

200

success stories the Ash Center at Harvard University has identified that are related to the use of data and analytics across the city, county, state, and federal levels in the United States.**

*Source: Deloitte Digital, Thirsty for Digital Transformation? Quenching the insatiable digital citizen, 2018
**Source: Deloitte Insights, Government Trends 2020: What are the most transformational trends in government today?, 2019

TREND 03: EXPERIENCE MANAGEMENT

Data Unlocks Personalized Citizen Experiences

Today's citizens crave a personalized, human experience tailored to their needs, wants and expectations. In fact, they expect it. Regardless of whether citizens are using a digital service, contacting an agency over the phone, or reaching out via social media, they are providing their data each time they interact with an institution. It's up to government and public sector agencies to unlock this citizen data and see the possibilities and meaningful experiences they can deliver. Insights like remembering information instead of making them enter it twice can improve the value of a service and boost citizen satisfaction.

INSIGHT TO OPPORTUNITY

- Government and public sector agencies can harness the power of the information offered up by their citizens with the right processes and technologies.
- The right data platform, combined with activation and automation tools, can cut through the noise and capture information that matters in a consolidated citizen record. The record can continue to be updated as more touchpoints occur—giving government and public sector agencies the insight they need to deliver personalized, human experiences.

"The benefits of personalization are evident. Governments can instill greater trust among citizens as they support each one with relevant information and more efficient delivery of services. Citizens, on the other hand, can feel more assured they will get the outcomes they seek and spend less time doing so. Therein, a compelling value exchange."

— Richard Deutsch, Chief Executive Officer, Deloitte Australia

33%

of Australians would be more likely to use government websites if they were better designed and delivered a more seamless citizen experience.*

**Source: Deloitte/Adobe, A blueprint for enhanced citizen experiences: The case for simple, smart and personalised government services, 2021*

TREND 04: EXPERIENCE MANAGEMENT

The Next-Gen Public Sector Employee

One of the obvious first questions that comes up around implementing new digital infrastructures is how do we train people to use it? Creating a digitally literate public workforce to interact with these technologies is as equally important as developing the technologies themselves. Unfortunately, due to budget restraints and other factors, many government agencies struggle to compete with the private sector recruiting and retaining the necessary IT talent.* That's why public agencies are instead developing in-house training programs that support reskilling and upskilling their existing staff. In 2020, two Abu Dhabi agencies collaborated to launch a specialized platform to improve technology skill levels of the Emirate's public sector workforce. Meanwhile, India launched a skill development program to educate civil servants in digital technology through a subscription-based, public-private model.**

Despite these promising advancements, governments have a long way to go to support upskilling their staff for the digital age. A culture of risk aversion still pervades much of the public sector.** Until agencies are willing to adopt a "test-and-learn" mindset around new technologies and ways of working, their data initiatives will struggle to find momentum.

*Source: Deloitte/Adobe, A blueprint for enhanced citizen experiences: The case for simple, smart and personalised government services, 2021
**Source: Deloitte, Government Trends 2021, 2021

INSIGHT TO OPPORTUNITY

- Supporting digital initiatives requires a trained staff that can work with them. Rather than trying to compete with the private sector for top-tier IT talent, public agencies can launch reskilling programs to prepare their employees for a digital age.
- Government agencies must address change-averse cultures within their organizations to pave the way for digital transformation.

$452B
Government IT investments in 2021.**

$452M
Amount set aside in Malaysia's federal budget for areas including digital workforce and digital transformation of small and medium enterprises.**

**Source: Deloitte, Government Trends 2021, 2021

TREND 05: EXPERIENCE MANAGEMENT

AI Powers Citizen Engagement

Artificial Intelligence (AI) and Machine Learning (ML) can allow government and public sector agencies to deliver audience segmentation and targeting at scale, automate decision making and curate the right experience for each citizen. Examples like the next-best-door approach matching citizens to public services and governments using predictive analytics to improve emergency response systems are just the tip of the iceberg of how this technology can benefit the public sector.

Public agencies are already embracing automation to replace manual tasks and provide faster service. Many governments leveraged this technology to deploy a quicker COVID-19 pandemic response, using AI-powered virtual assistants and chatbots to answer citizen questions and overcome language barriers. Data suggests this trend is only likely to continue as organizations realize the value of automation and predictive analytics in boosting citizen engagement and reducing administrative burden.*

Government and public sector agencies are realizing the double benefits of optimizing costs while improving operations and citizen satisfaction. One state deployed a cloud-based AI platform that gathers data from connected cars, road cameras, road conditions, weather patterns, and apps like Waze to predict where accidents are most likely to occur. This program reduced crashes by 17 percent and secondary collisions by 23 percent.**

*Source: Deloitte, Government Trends 2021, 2021
**Source: Deloitte Insights, Government Trends 2020: What are the most transformational trends in government today?, 2019

INSIGHT TO OPPORTUNITY

- Organizations can use technology advancements made during the pandemic as a launching pad for future investments and strategies, tapping into citizen data to power efficient, automated services.
- Emerging technology requires a test and learn approach. Government and public sector agencies should begin their AI/ML journey in an incremental and iterative manner. Conduct small pilots that provide a quick win and deliver value through measurable KPIs such as citizen engagement. Small-scale successes can be used to get buy-in from stakeholders and secure budget for larger scale deployments.

79%

of government officials indicate automation is making a significant positive impact on their business.*

*Source: Deloitte, Government Trends 2021, 2021

1.2B

federal working hours could be freed up by AI and automation, with a potential annual savings of $41.1 billion**

44%

Estimated growth rate for AI spending in central governments through 2022 (faster than AI spending in personal and consumer services)***

More than

80%

of early adopter public sector organizations are using or planning to use AI, and nearly 90% consider cognitive technologies to be of extreme strategic importance for their internal business processes.***

25+

countries have launched national AI strategies, including Germany, France, Japan, India, China and South Korea***

**Source: https://www2.deloitte.com/au/en/pages/economics/articles/rethinking-digital-dividend.html
***Source: Deloitte Insights, Government Trends 2020: What are the most transformational trends in government today?, 2019

The city of Jakarta analyzes data from citizen complaints, along with historical and sensor data to predict floods.*

Canada's revenue agency uses big data and predictive analytics to identify tax evaders and improve compliance.*

During the pandemic, France launched the AlloCovid service which uses an AI voice assistant to direct citizens with COVID-19 symptoms to seek appropriate medical care.**

*Source: Deloitte Insights, Government Trends 2020: What are the most transformational trends in government today?, 2019
**Source: Deloitte, Government Trends 2021, 2021

TREND 06: EXPERIENCE MANAGEMENT

Creating a Seamless Citizen Experience Through Digital Identity

Delivering seamless, frictionless experiences across touchpoints requires the ability to identify citizens across channels, email addresses, devices and timelines and create and maintain a single source of truth for each citizen. This helps create meaningful connections as citizens progress through their digital journey. Many countries have already begun to adopt digital identity programs, including Italy, China, and the United Kingdom. Estonia has implemented an advanced national digital ID system that allows citizens to pre-populate tax forms, vote, and access e-health records online.* Meanwhile, India has launched the world's largest digital identity program, providing a unique 12-digit identifier assigned to each of its 1.3 billion citizens based on their biometric and demographic data.*

*Source: Deloitte Insights, Government Trends 2020: What are the most transformational trends in government today?, 2019

INSIGHT TO OPPORTUNITY

- Identifying a known citizen opens so many doors for different types of engagement based on previous interactions. Anyone in the organization who has contact with a citizen should be able to see all other interactions and the result. This empowers citizen-facing employees across web, mobile, email and phone to deliver relevant and personal experiences that matter.
- To power the Human Experience, you need a 360-degree view of each citizen journey to help build trust and ensure privacy and security across touchpoints.

Source: https://www2.deloitte.com/us/en/insights/industry/technology/consumer-enterprise-digital-identity-management-strategies.html

$1B

Estimated amount saved on civil service staff in Nigeria using digital IDs.**

2%

in annual GDP savings achieved by Estonia's use of digital signatures.**

Source: Deloitte Insights, Government Trends 2020: What are the most transformational trends in government today?, 2019

A Citizen Journey Management System

Safe
To ensure security, privacy, and compliance.

Flexible
To work across multiple platforms (on-premise and cloud); work with people, systems, and devices.

Agile
To quickly adapt to changing end-user needs, IT requirements, and new applications.

Scalable
To address the shuffling requirements of the business-such as adding new users from an acquisition or managing an influx of customers.

Open
To accommodate many types of users, including employees, consumers, partners, and contractors.

Private
To give users control over their information and an understanding of how it is used and how they can access it

Frictionless
To provide a seamless and convenient experience for both users and cybersecurity administrators.

Resilient
To overcome potential service disruptions, technology failures, or Cyber threats-whether on-premise or in the cloud.

TREND 07: EXPERIENCE MANAGEMENT

Secure, Equitable Data Use Enhances Trust

Perhaps more than any other industry, government and public sector agencies have a responsibility to safeguard citizen data by implementing reliable cybersecurity systems across departments. Events like recent supply chain attacks in the private sector only underscore the importance of proper data stewardship.* As organizations scale their digital ecosystems, they must also scale their security efforts. Because at the end of the day, the citizen-government relationship is driven by trust. If people trust that their sensitive data is being used in a secure and ethical way, they will embrace public agencies' digital initiatives and experience the value they can provide to their lives. Establishing that trust requires granting citizens the ability to control what data they share, and with whom. In Estonia, citizens can monitor how the government uses their personal data through time-stamped digital logs, while India's digital identity system allows citizens to use a randomly generated virtual ID as a stand-in for their real ID for greater privacy.*

Beyond cybersecurity and data sovereignty, governments must also ensure any data used in decision-making is protected against bias. Inequitable data is inaccurate data. If data undercounts individuals in certain socio-economic groups, for instance, harmful policies can result. One report found that facial recognition systems have the highest error rates for people of color, women, and the elderly.*

Public agencies are already realizing the importance of identifying implicit bias in their digital workflows. New York launched a task force in 2019 to evaluate automated tools the city was using for resource allocation and recommend more equitable approaches. Across the world, New Zealand's Māori community created a project backed by government funding that explores tools to enable more ethical and equitable data use.*

INSIGHT TO OPPORTUNITY

- Adopting new digital technologies demands scaling cybersecurity operations to mitigate growing threats and protect sensitive citizen information. When citizens believe their data is secure, trust follows.
- Governments and public agencies should give citizens full control over their data – what they share, and who can access it. Transparent data use quells privacy concerns and encourages citizen engagement.
- Proper data stewardship involves more than just threat protection and privacy statements. Public agencies have a responsibility to interrogate their data systems for implicit bias and promote data equity across their organizations.

In 2020

60%

of US states outsourced cyberthreat assessments, up from 43% two years earlier.*

Biden administration has proposed adding

$9B

to set up shared IT and cybersecurity services across government.*

The UK recently invested

£700,000

in data trusts – legal structures that ensure proper data stewardship.*

*Source: Deloitte, Government Trends 2021, 2021
**Source: Deloitte, Government Trends 2021, 202

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What are the Next Steps for Success?

In today's changing world, understanding the human experiences that drive citizen needs and demands is imperative to the success of government and public sector organizations. Today's citizens are seeking personalized, seamless, and anticipatory services from their governments. Moreover, citizens expect public sector organizations to effectively and securely manage their personal data and utilize it in a way that enhances their lives.

NEXT STEPS

- Government and public sector agencies must expand their use of private sector partners to help accelerate digital modernization.
- Governments need to solve to citizen problems and pain points, NOT technology solutions or cost. Too often, public agencies adopt solutions to make short term costs appear lower. Instead, governments should implement solutions that can grow with them as the public's expectations grow over time.
- Finally, public organizations must adopt technologies like machine learning, artificial intelligence, content and data management systems to deliver personalized citizen experiences at-scale, foster trust, and increase organizational efficiency and efficacy.

Driving connection, loyalty, and growth for Government — together

At Deloitte Digital, we help clients see what's possible, identify what's valuable, and deliver it in a way no other professional services or creative agency can. Deloitte's Experience Management solution combines Deloitte proprietary assets, experience and know-how with commercial platforms from key alliances like Adobe to build and manage a winning customer engagement system that helps media and entertainment companies drive connection, loyalty and growth with each interaction.

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- Deloitte Digital named a worldwide leader in Digital Customer Strategy & Experience Consulting based on breadth and depth of capabilities by ALM Intelligence.[1]
- Deloitte named a leader by Gartner in CRM and Customer Experience Implementation Services, worldwide.[2]
- Deloitte named a global leader in Digital Experience Agencies based on current offering and market presence by Forrester.[3]
- Deloitte named a leader, ranked #1 by IDC in Digital Strategy Consulting, worldwide and in all regions.[4]
- Adobe Global Digital Experience Partner of the Year 2019
- Adobe Americas Digital Experience Partner of the Year 2020

Adobe

- Industry analysts have named Adobe a leader in over 23 categories, such as Web Content Management, Digital Marketing Analytics, Digital Commerce, Marketing Cloud Platforms, and more.[5]
- Adobe Experience Platform, the industry's first open and extensible platform that stitches data across the enterprise, enables brands to deliver impactful digital experiences in real-time.[6]
- Adobe Experience Cloud provides an end-to-end Customer Experience Management (CXM) solution for experience creation, marketing, advertising, analytics and commerce. It helps companies deliver consistent and compelling experiences across customer touch points and channels–all while accelerating business growth.[7]

More Information about how Deloitte Digital and Adobe Elevate the Human Experience

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