



Best practices for delivering a digital-first public experience

A digital experience (DX) playbook

≡ | **Pioneer**
Customer Experience

Optimizing your program's DX isn't just a good idea or the right thing to do. It's a requirement.

The 21st Century Integrated Digital Experience Act (21st Century IDEA)¹ requires all executive branch agencies to:

- **Modernize** their websites
- **Digitize** services and forms
- **Accelerate** use of e-signatures
- **Improve** customer experience (CX)
- **Standardize** and transition to centralized shared services

This playbook shares best practices that can help you meet these requirements while also keeping you on track to achieve your goals for program efficiency, costs, security, and overall constituent CX and outcomes.

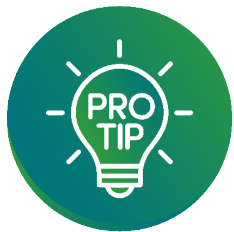
[1digital.gov/resources/delivering-digital-first-public-experience](https://digital.gov/resources/delivering-digital-first-public-experience)



In Memorandum M-23-22, the Office of Management and Budget (OMB) defines four elements for delivering a digital-first public experience:

- A. Requirements for Websites and Digital Services
- B. Digitization of Forms and Services
- C. Customer Experience and Digital Service Delivery
- D. Standardization

While it's important to build a holistic DX strategy for your program that accounts for all these elements, this playbook can help you simplify the process by looking at each element individually.



(Along the way, watch for our **“PRO TIP”** ideas and best practices.)



“Agency success in digital experience means developing and actualizing a **long-term organizational strategy** around digital service delivery, investing in **digital transformation** and necessary information **technology modernization** efforts, and, most importantly, building a **digital workforce** capable of delivering information and services to the public.”

- OMB Memorandum M-23-22

A. Requirements for Websites and Digital Services

The memorandum requires agencies to “maximize access and usability so the widest possible range of people may reach and interact with the government through its websites and digital services.” Taking these steps can help set you on the right course...



Know your audience: Dig deeply into your constituent data, so you can make informed decisions about content, technology, process, and other DX elements. Go directly to the source with frequent constituent surveys and focus groups.



Set your accessibility strategy: Check that you have the right tools and people in place to keep you compliant with Section 508 and WCAG and to identify issues before they become problems.



Assess your team: An array of talent is needed – strategists, designers, web engineers, writers, researchers, and more – to deliver world-class DX. Make sure your team has the right skills and is structured (and empowered) for success.



Document your brand standards: Memorandum M-23-22 requires consistent branding across all DX touchpoints. Create a style guide that's easily accessible to staff and partners. Hold all stakeholders accountable to following the standards and providing feedback.

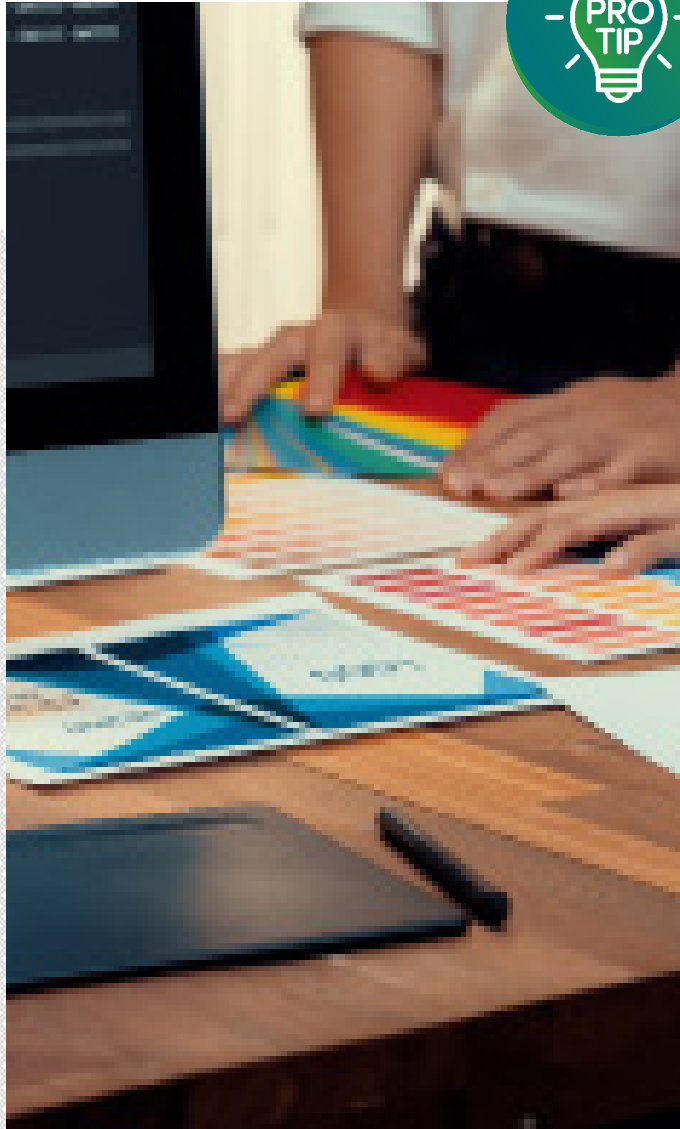
A. Requirements for Websites and Digital Services



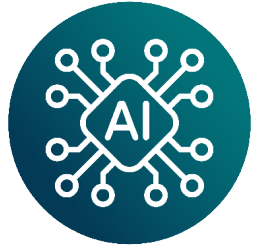
Share your style

A style guide is a documented set of rules and guidelines that your staff and partners should follow when representing your brand to the public. Codifying and publishing a style guide helps ensure a consistent, compelling, clear, and compliant DX. Whether you're creating a guide for the first time or updating an existing one, be sure it provides guidance on the following key style elements.

- **Typography:** Specify font family(ies), size, weighting, and spacing, including use by content level (headlines, subheads, body copy, footnotes, captions, etc.).
- **Color palette:** Define primary and secondary palettes, including CMYK and RGB codes.
- **Seal and logo use:** Document how your agency logos and seal should be used (size, resolution, minimum clearance space, use against backgrounds, etc.).
- **Buttons, tables, charts, forms, and callouts:** Define the styling for these and other special content elements.
- **Visual media:** Specify how to use images, photographs, videos, and other visuals, including dimensions, resolution, and compression for optimal web performance.
- **Symbols and iconography:** Define the use and styling of these elements. If possible, make a library of brand-approved options available for use.
- **Accessibility standards:** Provide guidelines for text alternatives, keyboard navigation, and other features to help ensure accessibility adherence.
- **Brand voice:** Document how your content should be written, in terms of tone, personality, level of sophistication, and other attributes.



A. Requirements for Websites and Digital Services



Getting smart with generative AI

Generative AI is an incredibly powerful tool for developing content quickly and at scale. Innovative public and private entities are using these tools to drive creativity and efficiency.

As with any technology, however, you don't want to just hand over the reins. Without human oversight, AI-generated content may cause DX risk and confusion. So be sure to apply the same content-development best practices you would to human-written content. For example...

- **Fact-check** for copyright or factual issues (and watch out for "AI hallucination").
- Avoid **colloquialisms** that some constituent audiences may not understand.
- Monitor your **content's sophistication** to make sure it's intelligible to people with an eighth-grade reading skill level.
- When **translating** content to another language, always have a native speaker ensure it's comprehensible and accurate.
- Regularly **audit your content across all channels** (web, email, print, phone scripts, etc.) and address any inconsistencies across these touchpoints.



Did you know...

... Microsoft Word can estimate your content's grade level readability? Under the Review menu, select "Editor." Then scroll down and click "Document stats" under "Insights."

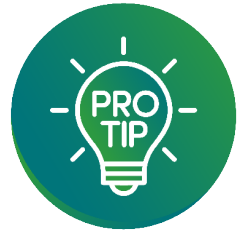
A. Requirements for Websites and Digital Services



Search matters

Whether they're shopping, ordering dinner, or getting driving directions, your constituents are used to finding what they need online through easy, user-friendly interfaces. They expect the same from your program, so make sure your information is easy to find through online searches. And once people are on your site, make it quick and simple for them to get what they need.

- Use **clear, descriptive page banner headlines**, as search engines highly value and rank that content. To further enhance search engine discoverability, use robots.txt files, sitemaps, and clear, keyword-rich metadata. ([Check out Google's tips for maximizing the value of metadata.](#))
- Monitor **trends in the terms people are using to search online**. Tools like [Google Trends](#) can identify emergent terms you may want to add to your site. Use your web analytics platform, too, to track **which terms are leading people to your pages**.
- Make sure you're using [Search.gov](#) for your on-site search solution.



A. Requirements for Websites and Digital Services

Protecting your program and those you serve

Your DX must be “secure by design, secure by default.” These best practices can help you protect your data and constituents...

- **Risk assessment and management:**

Conduct a comprehensive risk assessment to identify current and emergent vulnerabilities. Develop and implement a risk management plan that (a) prioritizes and addresses the identified risks, and (b) documents which teams and roles are responsible for each governance step and process.

- **Compliance with standards and frameworks:**

Align cybersecurity practices with established standards (e.g., NIST, ISO 27001). Ensure policies and practices adhere to the specific requirements of Memorandum M-23-22.

- **Incident response and recovery:**

Develop and maintain an incident response plan with procedures for detecting, reporting, and responding. Regularly test the plan through simulations and update it based on lessons learned.

- **Employee training and awareness:**

Invest in cybersecurity training to educate employees about policies, procedures, and best practices. Foster a culture of accountability, emphasizing the importance of reporting suspicious activities and following protocols.

- **Continuous monitoring and assessment:**

Implement always-on monitoring tools and processes to detect and respond to threats in real time. Regularly assess the effectiveness of your controls through audits, penetration testing, and other methods. Use the results to evolve your security posture over time.



**Stay in the know
on NIST and ISO**

[On NIST's website](#), you can follow their cybersecurity blog and sign up for alerts.

[On ISO's website](#), you can view educational video content and sign up for email updates.

Meet your constituents where they are

Your DX should enable your constituents to interact with your program on their preferred terms.



Meeting communication

preferences: Memorandum M-23-22 states you should allow constituents to set and save their preferred communication channels. For people who make these elections, be sure your processes and technologies are built to meet their requests.



Mobile-friendly experiences:

More than 50% of federal program interactions take place on mobile devices. Your web analytics platform can tell you which devices, operating systems, and browsers your constituents use to access your online resources. Track and use these insights to make informed decisions about your DX enhancements, budget allocation, and priorities.

Omnichannel and multichannel, defined

With a **multichannel** experience, constituents can complete a start-to-finish transaction in a single channel of their choice. **An omnichannel** experience, on the other hand, enables constituents to begin a transaction in one channel and easily transition to continue and/or complete the transaction in a different channel. **Memorandum M-23-22 states, “Agencies are strongly encouraged, where appropriate, to take an omnichannel approach to service design and delivery.”**



B. Digitization of Forms and Services



Stay in good form

Forms are indispensable to program operation. They help collect, transmit, and protect the sensitive data that pass between your agency and those you serve. To meet the form-digitization requirements of Memorandum M-23-22, keep the following concepts in mind.

- **User-centric design:** Start with users' needs and preferences. Talk to constituents about their experiences, and ask frontline staff for their input too. In some cases, it may be better to create a new form from scratch, rather than retrofit an existing, outdated paper form into a digital version.
- **Accessibility and compliance:** Section 508 and WCAG considerations are just as important with forms as they are with other elements of your DX.
- **Error prevention and validation:** Conduct thorough testing to identify and resolve any issues that may arise during form completion and transmittal.
- **Security and privacy:** Ensure data are protected always and in all directions.



Case in point: the power of automation and e-signatures

In our work with one federal agency, we enhanced an existing process by prepopulating personalized data in forms constituents were required to complete, and we also activated e-signature options for those forms. Under the original process, just 27% of people returned their forms within 60 days. **In our pilot, 71% returned their forms within 10 days.**

C. Customer Experience and Digital Service Delivery



CX success relies on data, technology, and staff

To meet your DX goals, these elements are key...



Reliable, up-to-date constituent feedback:

Set a strategy for collecting and consolidating CX evidence from all possible constituent touchpoints. Gather direct feedback with tools like surveys and focus groups. Collect indirect evidence from staff input, transaction tracking, social media, and trends in process times, resolution rates, and outcomes.



A team and technology platform that work in harmony to uncover and quickly act on CX insights:

When properly skilled, empowered, and incentivized, staff will see CX as a core element of their role and not as an added burden or requirement. Technology can enable their productivity through automation, reporting, security, and alerts.



Social media offers many ways to engage with and gather input from program participants and the general public. Segment or target your efforts to collect information from specific audience segments.

Surveys: Create and share polls or surveys to collect direct feedback on specific topics.

Interactive content: Use interactive tools (e.g., quizzes) to engage people in a more entertaining way.

Online discussions: Facilitate conversation in groups/pages dedicated to specific programs.

Analytics tools: Use your social media analytics platform to track engagement metrics, sentiment analysis, and overall trends of public opinions and concerns.

C. Customer Experience and Digital Service Delivery



Survey says: design and engage

Great DX relies on rich customer insights. When setting your strategy for collecting constituent input, prioritize design and engagement considerations.

Design: engineer your input mechanisms

- Keep surveys **short**. Focus on **metrics that matter**, and establish in advance what you plan to do with your findings.
 - Distribute surveys across **multiple channels**.
 - Ensure **mobile compatibility** and a **consistent survey experience** across devices and browsers.
 - **Focus groups** can be very helpful during pre- and early-design phases. Use them to find out why people come to your site and what their pain points are.
 - **Conduct user testing**, especially when finalizing design and content. Assign 8-10 participants
- a **list of specific tasks** to accomplish and/or **information to find** on your site.
- Survey people **while they are on your site**, as they leave, or when they take a certain action. This helps ensure timely, accurate input.
 - Use **pulse surveys** for representative constituent groups. Define important audience types, survey them at regular intervals, and aggregate data to achieve statistically significant results. Consider surveying smaller audiences regularly rather than surveying broad audiences just a couple times a year.

Engage: ensure understanding and participation

- **Personalize** invitations and send **reminders**.
 - For short surveys, **tell people in advance how long it may take them to complete it** ("less than 5 minutes," "just 3 questions," etc.).
 - Highlight **the importance of the research** you are conducting. Explain that it will help improve program experiences for people like them.
- Assure people that their feedback will be aggregated and kept **confidential**.
 - **Follow up** with respondents to express gratitude. Let them know how you are incorporating participants' feedback into your program.
 - Where possible and appropriate, offer **incentives for participation** (e.g., individual awards, sweepstakes entries, or charitable donations).



Standardization. Commonality. Consolidation.

Standardization can help streamline CX, reduce costs, and facilitate future program improvements.

- **Data sharing:** Conduct regular deep dives on your program's process times, and identify any manual processes. If data are not flowing smoothly – and automation is not optimized – it can negatively affect CX, satisfaction, and staff productivity.
- **Collaboration within and across agencies:** Watch for opportunities to work more closely with other agencies whose programs or missions intersect with yours. Monitor communication logs, organic and on-site search data, social media, and other sources for evidence that constituents or staff are encountering cross-agency CX challenges.
- **Redundancy:** Task dedicated DX engineers and content teams with ongoing audits of pages, forms, scripts, letters, texts, emails, and all other CX touchpoints to root out and fix duplicate, contradictory, and outdated information.



DX maintenance checklist

Memorandum M-23-22 provides guidance on many ongoing maintenance steps you should follow to meet your DX obligations. Though not exhaustive, the following list may help you organize your staff and technology around some of the memorandum's maintenance guidance.

Update and republish your **style guide(s)** as your brand standards evolve

Survey program users continually and document the feedback.

Regularly **review content** to address outdated, inaccurate, or duplicate information. At least once every three years from its initial publication date or date of last review, review any web content that's not actively maintained.

Perform ongoing **keyword research** and track **third-party search results** to better understand how the public is trying to find information. Use those insights to optimize your content over time.

Conduct **regular security assessments** and testing to assess the risk to your websites, and execute appropriate security testing.

Routinely track **user-device trends and DX performance metrics** to inform your program enhancements and priorities.

Maintain a clear, up-to-date **privacy policy and Privacy Program Page**.



Don't forget your footer

Memorandum M-23-22 requires your website's footer to contain links to the following resources:

Your "About" page, where you provide information about your mission, statutory authority, organizational structure, and strategic plan

Your Freedom of Information Act page

Your accessibility statement

Your vulnerability disclosure policy, providing a means for the public to report observed or suspected information security issues

Equal employment opportunity data required under the Notification and Federal Employee Antidiscrimination and Retaliation Act of 2002 (No FEAR Act)

Your Privacy Program page



Pioneer

Customer Experience

For more than half a century, our enterprise has partnered with government agencies to simplify and optimize their constituent experience.

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